

Teacher Autonomy and Professionalism: a Policy Archaeology Perspective

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DECLARATION

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ABSTRACT

Global challenges on education policy provide reason why perspectives regarding discourses such as teacher autonomy and professionalism are continuously questioned and new understandings are constructed. From a postmodern deconstruction methodology, this dissertation presents an original application of policy archaeology as a method to analyse how South African education policy in a globalised context can contribute to explore innovative perspectives regarding teacher autonomy and professionalism. The aim is to develop deconstructive insights of the two discourses, and more specifically, to explore how it is articulated in South African education policy in a globalised context. During my analyses, I not only articulated deconstructive insights regarding teacher autonomy and professionalism, but also labelled regularities which I utilised to explore innovative perspectives of the mentioned discourses.

I analysed three South African education policies (NSE, NPFTED and CPTD) and my exploration revealed three regularities namely: *governmentality*, *managerialism* and *performativity*. Such labelling was critical, because regularities constitute policy archaeology and act as pre-conceptual frames to search for innovative perspectives regarding discourses under study. At one stage I asked the question: “*Do the labelled regularities justify a policy archaeology of South African education policies to explore innovative perspectives regarding teacher autonomy and professionalism?*” I responded positively to this question, because South African education policies (like any other policies) contain discursive embodiments which regulate teachers’ practices. As a result, the labelled regularities paved the way for a policy archaeology of South African education policies in a globalised context.

I utilised the three regularities to analyse how teacher autonomy and professionalism are articulated in the NSE, NPFTED and CPTED. From this analysis, I suggested six innovative perspectives regarding teacher autonomy and professionalism: *disciplinary professionalism*, *flexibilised teacher autonomy*, *managerial professionalism*, *responsibilised teacher autonomy*, *performative professionalism* and *performed teacher autonomy*. From a Foucauldian frame of reference, I argued that the articulation of these original perspectives is an experiment that provides teachers with possibilities to go beyond mere compliance and docility.

The suggested innovative perspectives further provided ingredients for the development of South African teachers in terms of professional autonomy. I contend that the development of

professional autonomy becomes a further innovation which was necessary, because I had the desire of contributing towards the becoming of a different kind of teacher in the South African education system. Therefore, I advocated that *homo economicus*, *self-surveillance*, *ausgang*, *recovery*, *performer* and *parrhesia* be considered as suggested strategies which would enable South African teachers to be in charge of their teaching practices in order to define themselves anew in a globalised context.

KEYWORDS: postmodern deconstruction, policy archaeology, deconstructive insights, regularities, teacher autonomy, professionalism, innovative perspectives, professional autonomy

OPSOMMING

Globale uitdagings op onderwysbeleid bied rede waarom perspektiewe rakende diskoerse soos onderwyseroutonomieit en professionalisme voortdurend bevraagteken en nuwe begrippe daaromtrent gekonstrueer word. Vanuit 'n postmoderne dekonstruksie verwysingsraamwerk onderneem hierdie verhandeling 'n unieke toepassing van beleidargeologie ten einde innoverende perspektiewe rakende onderwyseroutonomieit en professionalisme in Suid-Afrikaanse onderwybeleid binne 'n geglobaliseerde konteks te ondersoek. Die doel is om met dekonstruktiewe insigte van dié diskoerse vorendag te kom, en meer spesifiek, om te eksploreer hoe dit in Suid-Afrikaanse onderwysbeleid binne 'n geglobaliseerde konteks geartikuleer word. Gedurende my analyses is nie net dekonstruktiewe insigte rakende onderwysoutonomieit en professionalisme oopgedek nie, maar is regulasies gekategoriseer wat ek aangewend het om innoverende perspektiewe van dié genoemde diskoerse die lig te laat sien.

Drie Suid-Afrikaanse onderwysbeleide (NSE, NPFTED en CPTD) is geanaliseer en vanuit my ondersoek is drie regulasies gekategoriseer, naamlik: *beheermentaliteit*, *bestuurskap en behaalbaarheid*. Sodanige kategorisering was krities noodsaaklik, omdat beleidargeologie deur regulasies gekonstitueer word, terwyl dit terselfdetyd dien as pre-konseptuele raamwerke wat daarop gerig is om innoverende perspektiewe rakende diskoerse na te vors. Ek het by geleentheid die volgende vraag gestel: “*Word 'n beleidargeologie van Suid-Afrikaanse onderwysbeleide in terme van die soeke na innoverende perspektiewe rakende onderwyseroutonomieit en professionalisme deur gekategoriseerde regulasies geregverdig?*” Ek het positief op hierdie vraag gereageer aangesien Suid-Afrikaanse onderwysbeleide (net soos enige ander beleide) diskursiewe uitdrukkings bevat wat onderwyspraktyke reguleer. In die lig hiervan het ek die standpunt gehuldig dat die gekategoriseerde regulasies die weg gebaan het vir 'n beleidargeologie van Suid-Afrikaanse onderwysbeleide binne 'n geglobaliseerde konteks.

Ek het die drie regulasies aangewend om 'n analise te doen van hoe onderwyseroutonomieit en professionalisme in die NSE, NPFTED en CPTED geartikuleer word. Vanuit hierdie analise het ek ses innoverende perspektiewe omtrent die voorgename diskoerse voorgestel: *dissiplinêre professionalisme*, *buigsame onderwyseroutonomieit*, *bestuursprofessionalisme*, *verantwoordbare onderwyseroutonomieit*, *bereikbare professionalisme* en *behaalde onderwyseroutonomieit*. Vanuit 'n Foucauldiese verwysingsraamwerk het ek die standpunt

handhaaf dat die artikulering van voorgenome unieke perspektiewe dien as 'n eksperiment wat voorsiening maak vir moontlikhede vir Suid-Afrikaanse onderwysers om die grense van blote gehoorsaamheid en aanvaarding verby te steek.

Die voorgestelde innoverende perspektiewe het verder idees vorendag gebring vir die bemagtiging van Suid-Afrikaanse onderwysers in terme van professionele outonomieit. Ek maak daarop aanspraak dat die ontwikkeling van professionele outonomieit uitgeloop het op verdere noodsaaklike innovering, omdat ek die begeerte gehad het om 'n bydrae te lewer tot die wording van 'n veranderde tipe onderwyser binne die Suid-Afrikaanse onderwyssisteem. Ek het daarom aanbeveel dat *homo economicus*, *selfondersoek*, *ausgang*, *herstel*, *opvoerder* en *parrhesia* oorweeg moet word as strategieë wat Suid-Afrikaanse onderwysers in staat kan stel om in beheer te wees van hul onderwyspraktyke sodat hulle, binne'n geglobaliseerde konteks, hulself nuut kan beskryf.

SLEUTELWOORDE: postmoderne dekonstruksie, beleidargeologie, dekonstruktiewe insigte, regulasies, onderwyseroutonomieit, professionalisme, innoverende perspektiewe, professionele outonomieit

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“The endeavour to know how and to what extent it might be possible to think differently, instead of legitimating what is already known”.

-Foucault-

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ABBREVIATIONS / ACRONYMS USED

| | |
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| CPTD | Continuing Professional Teacher Development |
| NPFTED | National Policy Framework for Teacher Education and Development |
| NSE | Norms and Standard for Educators |
| OECD | Organisation for Economic Co-operation and Development |
| SADoE | South African Department of Education |
| WMA | World Medical Assemblies |

CHAPTER 1

ORIENTATION

1.1 INTRODUCTION

Education policy reforms in the 21st century due to devolution and marketization, amongst others, have given rise to a set of paradoxes about the nature of teaching as a profession as well the professional identity and professional development of teachers. According to Sachs (2010) three such paradoxes can be highlighted to be of relevance with regard to education policy reforms. First, the call for teacher professionalism is occurring at times when there is evidence that teachers are deskilled and their work is intensified. Second, it should be acknowledged that rethinking classroom practices are exceptionally demanding with regard to fewer resources being allocated to teacher learning. Third, teachers are being exhorted to be autonomous while, at the same time, they are under increasing pressure to be more accountable and to maintain standards (Sachs, 2010: 150). Therefore I argue that, as a consequence of the paradoxes underpinning the changes in education policy and practice the very notion of teacher autonomy and professionalism needs to be explored and debated.

Consequently, this chapter will provide an outlay of the direction I intend to take so as to explore and debate teacher autonomy and professionalism. The research procedure in this chapter therefore outlines the background to the study, rationale and purpose, followed by the research questions and objectives. Furthermore, I intend to introduce the research methodology and research methods that will be utilised in this dissertation. It needs to be mentioned that different authors attached different meanings to “research methodology” and “research method”. Taking a pointer from Jacobs (2009: 5), this dissertation discerns between research methodology and research method in the following way: “*research methodology refers to a particular framework of thinking (paradigm), while research method involves a specific technique for gathering information*”. Subsequently, reasons will be provided why this study is demarcated within education policy studies, while a brief outline of the chapter orientation will also be indicated.

I shall now start this journey by providing a background to the study.

1.2 BACKGROUND TO THE STUDY

Since teachers have always been regarded as significant role-players in educational reform, they are also expected to fulfil functions due to the demands of entities such as governments, parents and the community as well as education policy, amongst others. As a former teacher, I am in a position to tell that teachers' functions include curriculum design, assessment and policy implementation as well as learner development, amongst others. I regard the mentioned functions as serious, because it guides teachers in providing appropriate and quality education so that learners' optimal potential can be unlocked. Also, education policy sets limits on the ways teachers can view their educational practices, it determines what can and cannot be said and establish what can count as truths in terms of teaching. However, expectations from the education system, parents, colleagues, amongst others, are not the same, and sometimes even conflicting, but they still intertwine with each other to sketch a general picture of what an autonomous teacher and professional should be like or is expected to be (Wang, 2012: 18). As a result, I argue that expectations from various entities will therefore, to some extent, influence our understanding of teacher autonomy and professionalism.

Teacher autonomy is generally perceived as a teacher's competence to develop as a self-determined, socially responsible and critically aware participant in and beyond educational environments (Reich, 2002: 46; Smith, 2001: 43-44 and Jiménez Raya, Lamb & Vieira, 2007: 1). Within this view autonomous teachers are aware of the reason, time, place and way in which they can acquire skills and updated knowledge as part of their teaching practice (Ramos, 2006: 189-190 and Hoyle & John, 1995: 4). Although I interpret the preceding views on teacher autonomy as teachers' capacity, freedom and responsibility to make choices concerning their own teaching, reality has shown that education authorities often exert control over teachers. Control confines teachers to such an extent that they are limited by what they could do, how they worked and with whom they might exchange knowledge and information with (Jacklin, 2001: 24; Goehler, 2000: 44 and Baxen & Soudien, 1998: 131). Treating teachers as subjects over whom control can be exercised, inevitably limits teachers' abilities to do their work independently and as such, teachers are rendered as passive and obedient practitioners with little or no autonomy. In this regard I argue that for teachers a loss of autonomy not only implies disrespect for their knowledge and expertise, but also robs them from being effective teachers. As a result, teachers are rendered as passive and

obedient individuals with little or no autonomy (Goehler, 2000: 44 and Taylor & Vinjevoold, 1999: 131-162).

Notwithstanding indications of freedom and control associated with teacher autonomy, Phelan (2008) asserts that:

“Teacher autonomy vacillates between being portrayed as mark of robust professionalism and as a sign of the difficulty other educational stakeholders have in influencing or believing they have influenced what teachers do behind closed doors. Whether cast as earned or stolen, bestowed by professional membership or diminished by external forces, autonomy is generally perceived as a quantifiable characteristic of an individual” (Phelan, 2008: 5).

By upholding such a view, Phelan (2008) creates the notion that teacher autonomy can be portrayed as a feature of professionalism. The idea of autonomy, implicit in professionalism, implies a form of “self-regulation in a collective sense” and “freedom in an individual sense”. In a collective sense, members of a professional occupation are expected to be sufficiently able, competent and knowledgeable to evaluate the quality of work undertaken by fellow members through self-regulation. Self-regulation therefore gives substance to teachers’ autonomy in a professional occupation like education in the sense that technologies of the self are considered to be: *“the various operations on their own bodies and souls, thoughts, conduct, and a way of being that people make either by themselves or with the help of others”* (Foucault, 1988a: 18). My opinion is that an understanding of the prior view may be based on the idea that the education profession is expected to produce professional practitioners who will be able and willing to be self-regulative. On the other hand, “freedom in an individual sense”, may refer to a process of: *“attempting to maintain the constant coherence of one’s own identity narrative and the acceptance of one’s own inadequacies”* (Anderson, 2003: 158). I argue that, not only do teachers seemingly have the power to be in control of their own work, but they appear to contribute to improvement of the quality standards that inform their professional practices.

Even though there seems to be an implicit connection between the two discourses under study, teacher autonomy and professionalism sometimes fail each other (Bryan, 2004). For example: “*professionalism from a government perspective is seen as something to be earned by teachers, which takes autonomy away from teachers, together with the right to call oneself a professional in terms of autonomous practice*” (Bryan, 2004: 142). Another view insists that: “*Professionalism is reconceptualised as teachers’ ability to show government that they are following policy documentation*” (Bryan, 2004: 142). From the latter views I depict differing moments of practices in the sense that teachers as professionals are not necessarily viewed as autonomous individuals, whilst autonomous teachers may not necessarily be considered as professionals.

From the prior points of view, I become aware of two different but related perspectives of teacher autonomy as a feature of professionalism: *teacher autonomy as freedom for self-direction in the education profession*; and *teacher autonomy regulated by education policy discourses*. Firstly, autonomy carries with it an implication that teachers have the ability to direct their own teaching practices while they make choices independently. Secondly, I am of opinion that when teachers are regulated by education policy discourses they become positioned subjects within disciplinary regimes which exert power over them to behave in particular ways.

What seems to be critical regarding the difference in the afore-going interpretations is that a deeper exploration of meanings attached to teacher autonomy and professionalism is critical. I argue that such an exploration is necessary, because the development of new educational outcomes resulting from globalisation foregrounds the critical role of teachers to autonomously and professionally express and organise their interests (*vide*: Thomas & Hewitt, 2011: 1378 and Cummings, 1999: 425). Educational outcomes and new policy discourses require that we set loose the idea that perspectives about teacher autonomy and professionalism might have to be reconsidered. In this regard, I assert that we have to find a different tone, a different way of looking, a different way of speaking and a different way of thinking about teacher autonomy and professionalism. I agree with Olssen, Codd & O’Neill (2004: 60) that in allowing for a different way of speaking and thinking, we can open ourselves to be critical of how the rules and regularities in education policy documents are construed as expressions of information, ideas and intentions about the afore-mentioned discourses.

In view of the preceding, my endeavour in this dissertation is not to communicate meanings already known regarding teacher autonomy and professionalism. I took a position of scrutinising teacher autonomy and professionalism from the *outside-in*. As a lecturer at a university in South Africa, I observed my own role as a teacher as well as that of others from a different position and it made it easier for me to speak out about the discourses under study. Therefore, my aim is to ask questions about about teacher autonomy and professionalism of what we might have not thought to think, about what might have been densely invested; about what has been muted, repressed and unheard of in terms of South African education policy in a globalised context (*vide*: Lather, 1991: 156). In doing so, I took a stand against grand narratives, because I shall be afforded opportunities to effectively unpack, dismantle and scrutinise already existing meanings of the discourses under study. Therefore, in the context of this study, I shall be in a position to conduct a comprehensive investigation to search for innovative perspectives regarding teacher autonomy and professionalism as articulated in South African education policy in the context of globalisation.

Educational changes due to globalisation during the past two decades require the re-conceptualisation of teacher autonomy and professionalism. In this regard: “*the scale of change in the world, the growth and development of knowledge and technology and the demands of the 21st century require a different kind of teacher who will ensure that different and higher level skills and knowledge will be attained*” (Department of Education, 2005: Section 1). The foregoing seem to resonate the perception of globalisation as a set of processes whereby the education scene is rapidly changed by economic development, political power relations and the transformation of the state (Arowolo & Aluko, 2010: 2). Globalisation, informed by issues such as migration, the spread of ideas, new education policy discourses and difference in educational practices (Higgott & Reich, 1998: 4), challenges teacher autonomy and professionalism. Both teacher autonomy and professionalism are challenged on the basis of specified knowledge regarding international competitiveness, properly trained labour force, as well as multi-skilled, flexible, value-adding and problem-solving workers. Arguably, I contend that such global challenges on teachers’ work and the development of new educational outcomes are indications that we should think anew of what it means to be a teacher in the education profession in globalised times.

In view of global challenges on educational conditions, policy discourse and the work teachers do, I assert that one has to find a different tone, a different way of looking, a

different way of speaking and a different way of thinking about teacher autonomy and professionalism. I express the view that we can open ourselves to be critical of how rules and regularities in South African education policies are construed as expressions of information, ideas and intentions about the discourses of teacher autonomy and professionalism. One possible way of reconsidering these discourses during times of globalisation is by analysing the discourses upon which education policy (also South African education policy) is built (Olssen *et al.*, 2004: 60).

During such an analysis, I assert that spaces can be created to gain deep knowledge on how teacher autonomy and professionalism are articulated in South African education policy within a globalised context. Working with the assumption that South Africa education policy is informed by globalisation, I propose that a *policy archaeology* will enable me to explore innovative perspectives regarding teacher autonomy and professionalism. Policy archaeology: “*Examines the form of regularity, that is, the discursive conditions, which order the structure of a form of discourse and which determine how such orders come into being*” (Olssen *et al.*, 2004: 46). As such, policy archaeology, which I will deliberate on in section 1.7.2 and applied in Chapter 4, searches for regularities that may contribute to alternative perspectives on teacher autonomy and professionalism in South African education policies. Innovative perspectives may refer to a way of *criticality* which involves the ability to think outside a framework of conventional understanding (Burbules & Berk, 1999: 45). It means to think anew, to think differently and to reveal hidden meanings of things. By being critical and explore innovative perspectives regarding teacher autonomy and professionalism, I would be in line with Foucault who propagates that one should “*Think differently, instead of legitimizing what is already known*” (Foucault, 1985: 9).

1.3 RATIONALE AND PURPOSE OF THE RESEARCH

Early in the 1990’s, when I first began my career as a teacher, I was so overwhelmed by my work that I gained the idea that teaching was ultimately only for the sake of learners and their progress. I had the idea that good teaching involved being responsive to each of the individual learners I was responsible for – to get to know the quirks and uniqueness of each learner and geared my teaching to those. I was so dedicated that the principal’s recommendation: “*everything we do for our learners and for education must be done in*

accordance with education policy”, never appeared to be problematic. Thus, an obedient subordinate, I follow policy prescriptions to the letter and never questioned restrictions placed on my own autonomy, abilities and skills.

Four years after being a devoted teacher and while studying towards the B.Ed (Hons) degree, I was appointed head of department of both the intermediate and secondary phases at a school in South Africa. As manager and leader in those phases, I not only become responsible for learners, but began to work more closely with teachers and evaluated their educational practices. It was during that time that I realised how education policy confine teachers to, amongst others, adhere to planning the curriculum, what teaching methods they should apply and when they have to teach certain content. Teachers were ultimately marginalised to do their work independently and as such, teachers were rendered as passive and obedient practitioners with little or no autonomy. Despite my later efforts to empower teachers to take control over their teaching practices, to apply their competence in a responsible manner as well as participating in educational decision making, they were too afraid to act against departmental policy instructions.

Between 2005 and 2009, when I was principal at a school in South Africa, I partly succeeded in promoting independence, autonomy, professional discretion and professionalism amongst teachers. Teachers were afforded opportunities to be aware of their strengths, weaknesses, the nature of their own development and their own beliefs about teaching and learning. Albeit these efforts my colleagues mostly were still too careful to work as independent individuals.

Another four years later, I was appointed lecturer in Philosophy and Policy Studies in Education at a South African university. I was challenged to study policy processes more thoroughly and critically in order to understand how policy makers arrive at policy statements that have reference to teacher autonomy and their status as professionals, amongst others. As a lecturer, I teach policy studies and, while reading the works of Barfield *et al.* (2001), Little (1995), Smith (2001) and Vieira (1999), amongst others, my interest to explore the discourses of teacher autonomy and professionalism deepens. Although many research has been done regarding teacher autonomy and professionalism I realised that little research regarding the latter discourses has been conducted by means of an analysis of South African education policy in a globalised context.

South African education policy, against the background of globalisation, stipulates that: “*Policy challenges are to ensure that we engage critically and creatively with the global imperatives as we determine our national and regional goals, priorities and responsibilities*” (Department of Education, 1999 & 2000a: Section 4.1). This stipulation implies challenges for teachers with regard to the transformation of the curriculum, lifelong learning and a greater degree of specialised knowledge aimed at responding to the demands of the 21st century. For teachers: “*The greater the degree of specialized knowledge and skills required of the occupant of a position, the greater the degree of autonomy that accrues to the position*” (Katz, 1968: 21). Considering the prior view, I realised that teachers as professionals gain autonomy largely when they are allowed to be independent regarding the services they render. As a result, I became curious about teacher autonomy and professionalism as articulated in South African education policy in a globalised context.

My curiosity in how South African education policy in a globalized context informs teacher autonomy and professionalism is not a matter of just understanding educational context or reading education policy as the pronouncement of policy makers. Since policy documents are discursive embodiments containing various elements of underlying social power relations at particular points in time (Olssen *et al.*, 2004: 2), my intention is to explore how teacher autonomy and professionalism are informed by South African education policy in a globalised context.

In the analysis of educational policy, decoding has been done in different ways. However, never before has South African education policy been subjected to *policy archaeology* in order to reveal innovative perspectives regarding teacher autonomy and professionalism. Policy archaeology constitutes a way of analysing the super-structural dimensions of language statements constitutive of discourse (Foucault, 1972: 114). By applying policy archaeology (Chapter 4), the rules of formation of discourses and regularities that determine the systems of possible power relations and structures of dominance will be analysed. Therefore, I argue that such an analysis is based on a search for innovative perspectives on teacher autonomy and professionalism as articulated in South African education policy in a globalized context.

As a recent development in educational policy studies policy archaeology not only provides a method for analysing educational and social policy, but it goes beyond the traditional policy

studies framework as it accepts or presumes a commitment to the larger liberal world view in which it exists (Scheurich, 1997: 94-114). As an approach to policy studies where one opens up a new territory that establishes a new problematic, policy archaeology is an approach that serves to alter and expand the area of policy studies. As such, policy archaeology is useful for my research in that it enables the expansion of policy analysis by asking questions that can promote the investigation of how South African education can contribute to innovative perspectives on teacher autonomy and professionalism. Drawing from Scheurich's method (1997) of inquiry, I suggest that this method can provide a way of investigating innovative perspectives relating to the afore-mentioned discourses.

I undertook various steps in an attempt to find evidence if research of this kind has ever been undertaken within the South African education policy context. I read widely about research projects on South African education, education policy, globalisation, teacher autonomy and professionalism. I consulted the works of different well-known scholars, amongst others (Young, Waghid, Tikly, Salim and McGrath, Ntshoe, Gardiner and Skinner, Wits Education Policy Unit and Chisholm). I found that research conducted in South Africa and internationally mostly focus on the influence of globalisation on South African education or the influence of globalisation on the South African curriculum in general. I reviewed papers and research in which policy archaeology has been used, paying special attention to how the concepts of teacher autonomy and professionalism have been examined. To strengthen my search, databases such as ERIC, Academic Search, Africa Wide (incorporating South African studies), Humanities International Complete, Humanities International Index and MasterFILE Premier were consulted. I could not find evidence of any study or related study in which policy archaeology was used to analyse South African education policy to explore teacher autonomy and professionalism. After such extensive investigation, I was convinced that this study can make an original contribution to policy studies in education for the following reasons:

- appeals to consider autonomy as a basis for human dignity and a basic moral respect (Hill, 1991: 25) provide reason why the discourses of teacher autonomy and professionalism should be considered contentious. I therefore consider it necessary to explore how teacher autonomy and professionalism are articulated in South African education policy within a globalised context;

- innovative perspectives on teacher autonomy and professionalism may serve as a critical component in guiding scholars, educationists and researchers with deconstructive insights about educational discourses that has been undergoing considerable changes due to the influences of globalisation;
- this research undertakes an inaugural application of policy archaeology as a method to analyse how South African education policy in a globalised context can contribute to innovative perspectives on teacher autonomy and professionalism; and
- this research will grant me the opportunity to reveal how the constructed perspectives may contribute to the empowerment of South African teachers regarding their professional autonomy.

1.4 RESEARCH QUESTION AND SECONDARY QUESTIONS

Whilst education policy debate worldwide has been informed by discourses conversant to globalisation, the framing of South African education policy within the context of globalisation was anticipated:

“South Africa has taken a conscious decision to actively understand the emerging form and function of globalisation, and to locate itself as a competitive economy within this international context” (Department of Education, 2000a).

Given globalisation’s prominence to market-driven policies and its demands for education, South African education policy-makers have developed rules and regulations pertaining to the opportunities of the global era to harness the positive capacities of new technologies. These demands, amongst others, can be indicated as:

“[t]he growth and development of knowledge and technology that required learners to be exposed to different and higher level skills and knowledge than those required by existing South African curricula. The curricula for schools therefore required revision to reflect new values and principles, especially those of the Constitution of South Africa” (Department of Education, 2005); and

“[n]ew programmes and policy initiatives were to not only maximise the effectiveness of technological investments, but also to ensure that technology is driven by human development and capacity” (Department of Education, 2000a).

Bearing these demands in mind, Weber (2007: 279) asserts that South African education policy reforms affect teachers because of regulations regarding school governance, curricula and pedagogies, new norms and standards for educators and the implementation of quality assurance procedures. In a similar voice, Barber (1995: 76) notes that it is expected from teachers to understand their roles as individuals; contribute to new knowledge production; enhance creative and critical thinking and to be effective in the execution of their work. For me, an implication for South African teachers is that as implementers of policy, they must be able to translate new policy directives into teaching practices that meet the challenges of globalisation. As such, new global policy regulations challenge teachers in the education profession to unleash their creative and innovative teaching potential. To address new educational challenges, I hold the view that teachers should aim to develop a new culture and ethos where passivity is replaced by active engagement in the education profession. Whilst active engagement may lead to a sense of purpose, pride and professionalism, the latter may encourage teachers to be facilitators of educational knowledge, exercise innovative educational practices as well as to be lifelong learners (Department of Education, 2000a: Section 7.1; Wang, 1997: 263 and Little, 2000: 45).

I become cognisant as to how the preceding brings an understanding of how South African education policy framed in a globalised context requires different thinking about the discourses of teacher autonomy and professionalism. I argue that such requirement seems relevant, because education policy attempts to change teachers' practices without considering ideas of their professional responsibility and specialised knowledge.

Based on the prior explication, I considered *policy archaeology* as a method for policy analysis that will allow the questioning of existing perspectives regarding teacher autonomy and professionalism. Although a deliberation will follow at a later stage in this chapter, I contend that a policy archaeology of South African education policy introduces an approach to policy studies that can open new territory for a different debate on teacher autonomy as well as professionalism and its interconnection with education policy within a global context.

In view of this study and since policy archaeology is considered a useful tool to analyse education policy, the main question for this research is:

How can a policy archaeology of South African education policy in a globalised context contribute to innovative perspectives on teacher autonomy and professionalism?

This research will be directed by the following secondary research questions:

- 1.4.1 what insights regarding the relationship between teacher autonomy and professionalism may be derived from the academic literature?;
- 1.4.2 which regularities in South African education policy in a globalised context may be identified as frames of analysis to conduct a policy archaeology?;
- 1.4.3 what innovative perspectives regarding teacher autonomy and professionalism may emerge from a policy archaeology of South African education policy?;
- 1.4.4 how can the constructed perspectives contribute to the empowerment of South African teachers regarding their professional autonomy?; and
- 1.4.5 how can this research contribute to future education policy studies in the South African education policy landscape?

1.5 RESEARCH AIM AND OBJECTIVES

Derived from the research questions, the primary aim of this study is to explore:

“how South African education policy in a globalised context can contribute to innovative perspectives regarding teacher autonomy and professionalism”.

In support of this aim, the objectives of this study are to:

- 1.5.1 study academic literature to obtain insights regarding the relationship between teacher autonomy and professionalism;
- 1.5.2 determine which possible regularities in South African education policy can be identified as frames of analysis to conduct a policy archaeology;

- 1.5.3 explore innovative perspectives regarding teacher autonomy and professionalism that may emerge from a policy archaeology of South African education policy;
- 1.5.4 provide edification on how the constructed perspectives may contribute to the empowerment of South African teachers' professional autonomy; and
- 1.5.5 reflect on the contribution of this research to future education policy studies in the South African education policy landscape.

My intention with this postmodern research, by means of policy archaeology, is not to provide universal truths or to suggest obvious policy perspectives associated with teacher autonomy and professionalism. Rather, I intend to explore what innovative perspectives relating to the latter discourses may emerge in South African education policy. To find answers to the proposed research question and secondary questions, I intend to conduct research from a postmodern deconstruction methodology.

1.6 RESEARCH METHODOLOGY: POSTMODERN DECONSTRUCTION

Drawing on the work of Harvey (1990), research methodology may be viewed as the interface between methodical practice, substantive theory and epistemological underpinnings. Epistemology in this sense refers to the presuppositions about the nature of knowledge that inform practical inquiry. As such, methodology may refer to noting more than a simple set of methods or procedures, or it may refer to the rationale and philosophical assumptions that underlie a particular study relative the scientific method. Methodology is thus the point at which method, theory and epistemology come together in a process of directly investigating instances within the social world (Harvey, 1990: 1-2). Thus, research methodology is a way to systematically engage with the research problem and may thus be understood as a science of studying how research is done scientifically (Kothari, 2004: 8).

As alluded earlier, postmodern deconstruction will be utilised as the theoretical starting point of this study (Call, 2001; Chagani, 1998; Clayton, 2002; Couzen Hoy, 1988; Usher and Edwards, 1994; Gill, 2000; Hicks, 2004; Lieten, 2001; Mobey, 2009; Sanders, 2006 and Scheurich, 1993 and 1997). My choice in utilising a postmodern deconstruction methodology rests on my intention to analyse South African education policy texts to critically explore alternative perspectives of teacher autonomy and professionalism. I shall henceforth

deliberate on postmodern deconstruction by providing an explanation of *postmodernism*, *deconstruction*, *defining postmodern deconstruction* and *the rationale for a postmodern deconstruction*.

1.6.1 Postmodernism

The term “postmodernism” first entered the philosophical lexicon in 1979 with the publication of *The Postmodern Condition* by Jean-Francois Lyotard. Following this publication, Lyotard declared: “*I define postmodern as incredulity toward meta-narratives*” (Lyotard, 1984: xxiv). According to Harber (1994: 119) Lyotard’s disbelief in fixed storytelling implies that the possible narrative construction or stories we tell are always open to re-description or reinterpretation. Stories, just like education policy texts, should not be considered as monolithic entities, but rather as a way of speaking out against a confidence in objective or scientific truth. Concurrent within the latter view is Foucault who postulates that: “*a postmodernist will develop actions, thought and desires by proliferation, juxtaposition and disjunction [and] prefer what is positive and multiple, difference over uniformity, flows over unities and mobile arrangements over systems*” (Foucault, 1984a: xiii). This view of Foucault, according to my interpretation, has at its basis a questioning of ultimate truths as well as a rejection of grand narratives. It is thus not surprising that Tinning (1991: 11) interprets Foucault’s view as multiple readings or interpretations of texts and values eclecticism rather than one way of thinking about texts.

A referral to multiple interpretations and the rejection of ultimate truths imply that postmodernism can also be seen as a celebration and tolerance of pluralism and difference that leads to a much more ambivalent and less fixed positioning of subjectivity. To explain the latter view, I consulted the work of Usher & Edwards (1994: 6-18). These authors assert that, from a postmodernism perspective, the subject does not exist naturally and pre-formed, but is rather a cultural construct, inscribed by discourses as well as the constructive power of language. By talking about discourses and the constructive power of language, I immediately locate myself in the postmodern. One of the significant insights offered by such a location is that language and the way it is organised into particular and delimited networks of meaning (discourses) is not innocent, because language as a signifying system does more than just to denote and to describe. Postmodernists problematize meaning and language and as such the constitutive power of language is foregrounded. Through language, discourse and texts,

multiple meanings can be created and re-created in ways of which we are rarely aware of (Connor, 1989: 5).

Considering the afore-going deliberation, it is at this point where I want to bring the education profession and my endeavour to uncover innovative perspectives regarding teacher autonomy and professionalism into the picture. According to Usher & Edwards (1994: 24-25) education and the role of the teacher is founded on the humanist idea of a kind of subject who has the inherent potential to become self-motivated and self-directing. As a result, the teacher should be considered as a subject capable of individual agency. The task of education in postmodern times should therefore be understood as one of “bringing out” and “helping teachers to realise their potential” so that they can become autonomous professionals who are capable of exercising their individual and intentional agency (Usher & Edwards, 1994: 28-29). Thus, I am of opinion that education, as a profession in line with education policy, is allotted a key role of making people (teachers) into particular kinds of subjects. Aligned with the latter, postmodernism emphasises that a teacher’s world is constructed through discourse in education policy documents.

The thought that teachers’ realities are constructed through social discursive representation in education policy documents does not make reality less real. However, postmodernists argue that reality can be seen differently and difference can be seen in reality (Usher & Edwards, 1994: 28). In line with the latter postmodernist view I argue that different realities about teacher autonomy and professionalism are to be found in South African education policy documents. Therefore, I contend that postmodernism provides a framework to explore how teacher autonomy and professionalism are articulated in South African education policy documents. Hence, while deciphering texts in South African education policy, instead of reducing interpretations to single meanings (Usher & Edwards, 1994: 211), I am of opinion that there should be a celebration of different voices regarding innovative perspectives on teacher autonomy and professionalism.

Postmodernism theory, in the words of Walshaw (2004: 3-4), would enable me to shift focus from generalisations towards exploring tentative scepticism of established articulations of teacher autonomy and professionalism in South African education policy documents.

Although I align myself with the assumptions of postmodernism, it is, in the light of policy archaeology as my proposed research method (which I shall discuss later), important to explain the link between postmodernism and post-structuralism. Framing post-structuralism within postmodernism, one finds post-structuralism which might be seen as the theoretical part of postmodernism. Post-structuralism implies that meaning is elusive and incomplete in the sense that language can never perfectly convey what is meant by the language user (Velibeyoglu, 1999: 1). Included within the latter frame is Foucault who is usually seen as one of the major “post” theorists. The importance of this connection is because Foucault is frequently seen as post-structuralist and sometimes as postmodernist although he did not want to be assigned to any of these paradigms. Foucault (post-structuralist and postmodernist) regards nothing as the truth and considers all texts to be deconstructed. He advocates that no grand narratives exist and that all research must be open to change and falsifiability. In this regard Clayton (2002: 840) notes that Foucault does not offer any all-embracing theory of human nature. He (Foucault) was critical of meta-theory: beliefs that claimed to give an exclusive objective explanation of reality. For Foucault there are no ultimate answers waiting to be uncovered. The discursive practices of knowledge are not independent of the objects that are studied, and must be understood in their social and political context (Clayton, 2002: 840). Thus, if spaces are left open to deconstruct discourse under study, I argue that substance is given to a postmodern reality.

1.6.2 Deconstruction

Postmodernists propose that practices and ways of thinking be employed where universal truths about (education policy) texts, discourses and constructions of meaning are questioned (Larner, 1994: 12). Considered a heuristic in postmodern theories, deconstruction can be deemed such a practice to undo or take-apart a text or narrative, followed by a reconstitution of a text into an entirely new story or meaning.

The concept of deconstruction was formulated by Jacques Derrida in the 1960's out of the philosophical writings of Heidegger, and reveals a way of knowing which typifies French post-structural and postmodern thinking (Higgs, 2002: 170). Higgs (2002) explains that Derrida delivered a paper called *Structure, sign, and play in the discourse of human sciences* at a John Hopkins University conference on the importance of structural enterprise. His paper was collected into *Writing and difference*, which was published in translation in 1978.

This provocative commentary revealed the pretense of contextual stability and introduced a new term: deconstruction. Derrida used deconstruction in 1966 at the John Hopkins conference to signal going beyond structuralism:

“It is a question of explicitly and systematically posing the problem of the status of a discourse which borrows from a heritage the resources necessary for the deconstruction of the heritage itself” (Derrida, 1978: 282).

For Kaye, Wood & Stinson (1992: 80), at the level of theory, Derrida’s remark on deconstruction involves a shift in epistemology: from a notion of ultimate truth to notions of multiple meaning. The implication of the latter is that existing meaning of discourse may be exposed, debunked and pushed aside in favour of more postmodern perspectives. I find confirmation of the prior view in Lather who explains: *“one cannot define, finish or close”* (Lather, 2001: 184) and Atkinson who emphasises that there should be a: *“standing against the fantasies of grand narratives”* (Atkinson, 2002: 73-74). As such, I become aware of how deconstruction affords the analyst opportunities to consider multiple meanings and relationships of key words in education policy texts in order to show how texts speak with different voices. Construed in this manner, deconstruction of a text does not proceed by random doubt or arbitrary subversion, but by the careful teasing out of warring forces of signification within the text itself. This, in the words of Derrida, is an indication that to deconstruct a text: *“is not to oppose or subvert it, but to reveal what it intends to exclude and suppress, and to examine its conceptual and ideological schema”* (Derrida, 1988: 87 and 1978: 279). It becomes evident to me that deconstruction thus compels us to oppose objective realities, the so-called real and true meaning of texts.

The foregoing suggests that deconstruction appears to be a bold, innovative and radical methodology which not only arms its advocates with new insights into the figurative power of language and the endless intersections and crossings that define the world of texts, but also hunts for gaps and fissures in a text (Cain, 1984: 812). Interpreting Cain’s view (1984), a deconstructor considers the multiple meanings of key words in texts, etymological relationships between words and even puns to show how texts speaks with different voices. This activity by the deconstructor would entail not repeating and conserving meaning (Caputo, 1997: 30), but exposing the tensions and contradictions in texts. As Caputo (1997: 31) further emphasises: *“the very meaning of, and mission of deconstruction, is to show that*

things - texts, institutions, traditions, societies, beliefs and practices of whatever size and sort you need – do not have definable meanings ... that they exceed the boundaries they currently occupy". I consider Caputo's view (1997) as a way of making an effort to go beyond the boundaries of meaning, to disrupt the present meaning in texts (also education policy texts) and to allow other meanings (difference) to emerge. Taking Caputo's views into account, I ask the following question: *what then does postmodern deconstruction refer to?*

1.6.3 Explicating postmodern deconstruction

In explicating the methodology underpinning this study, I consulted Waghid (2002: 56) who asserts that deconstruction is a form of post-critical, postmodern or post-structuralist inquiry whose concern is to reflexively challenge and re-think systems of knowledge premised on critical, modern or structuralist norms and standards, and transcends them. For the purpose of this research, I want to indicate that postmodern deconstruction will be utilised not to simply transcend the latter, rather an attempt will be made to also embrace and build on them. Thus, although deconstruction is a postmodern/critical/structuralist theory, the term "post" does not mean that deconstruction replaces other theories (Watson & Wood-Harper, 1996: 60 and Tlali, 2010: 9). Rather, deconstruction builds on and depends upon other theories as prior systems of analysis.

Whichever view one holds, deconstruction in the postmodern warns the reader not to accept statements made at face value, that reading statements is a difficult process and eschews conveying obvious, definite or clear meanings (Mapp, 1990: 783). This is underscored by the notion that deconstruction is seen as a liberation from traditional ways of thinking, a challenge in resistance to closure and an opening up of new viewpoints and its potential creativity (Cantor, 1988: 362). This is essential to a fundamental attitude in the postmodern, which is, an acknowledgement of pluralism and a move away from a belief in universal or global values.

With the illumination of deconstruction in the postmodern thus far, I intend to create an awareness that deconstruction should not be limited to a specific theory. The attachment of deconstruction to the postmodern is thus relevant, because, as Derrida explains:

“It (deconstruction) is not simply a doctrine, not a system, not a method, but something that is tied to an event. When I have to summarise briefly what deconstruction is, and should not be, I often say: deconstruction is quite simply what happens. It is not simply the theoretical analysis of concepts, the speculative de-sedimentation of a conceptual tradition, of semantics. It did not appear in the twentieth century, or as a modern movement in the academy in the West. No, I think in every event, not only philosophical, in every cultural event there is some deconstruction at work” (Derrida, 1999: 280).

For me, Derrida’s explanation illustrates that the deconstruction of texts to search for multiple meaning in the postmodern is not far-fetched, because meaning at any point in time is never final. Hence, it involves a constant questioning and dismantling of implicit and explicit notions of presence and concentration on play of metaphors and the play of language at any given time (Eagleton, 2003: 31).

1.6.4 The point of postmodern deconstruction

The book, *Deconstruction in a Nutshell: A Conversation with Jacques Derrida*, offers a short summary of what deconstruction entails (Derrida & Caputo, 1997). An explanation is given that deconstruction is to show that things – texts, institutions, traditions, societies, beliefs and practices – do not have definable meanings and determinable missions. Every time one tries to establish the meaning of a thing, to fix it in its missionary position, the thing itself, if there is anything at all to it, slips away. A “meaning” or a “mission” is a way to contain and compact things into a unity, whereas deconstruction bends all its efforts to stretch beyond these boundaries, to transgress these confines, to interrupt and disjoin all such gathering. Thus, whenever deconstruction finds a nutshell, the very idea is to crack it open and disturb such tranquillity (Derrida & Caputo, 1997: 31-32). Against this backdrop, postmodern deconstruction becomes useful as a methodology that guides my intention to analyse South African education policy.

Education policy can be considered as: *“a course of action adopted by government, through legislation, ordinances, and regulations, and pursued through administration and control, finance and inspection, with a general assumption that it should be beneficial to the country*

and its citizens” (Hartshorne, 1999: 5). Based on Hartshorne’s view, it seems to me that education policy regulates the educational practices of teachers by means of prescriptive legislation and mechanisms of control. The regulatory function of education policy, according to Olssen *et al.* (2004: 2) should be seen as discursive embodiments of the dynamics of various elements which underlie social practices at particular points in time. Therefore, I hold the view that to read education policy is not just a matter of understanding its educational context or reading it as pronouncements of policy-makers, but rather to bear in mind that: “*the discursive formations they contain... await decoding*” (vide: Olssen *et al.*, 2004: 2).

In view of the prior deliberation and if brought into the educational discourse, deconstruction is not a matter of a set of guidelines, rules or prescriptions which can be applied to remedy whatever ails education (Biesta & Egéa-Kuehne, 2001: 4). Rather, I become aware that Derrida’s deconstruction in the context of education calls for an engagement with certain forms of reasoning in analysing educational issues (such as teacher autonomy and professionalism). Such an engagement needs to be an attentive and respectful reading “*through work which actually requires time, discipline, and patience, work that requires several readings, new types of reading, too, in a variety of fields*” (Derrida, 1995: 401 and 1982: 26). Interpreting Derrida here, I would argue that, deconstruction as research methodology, can guide me in some powerful rethinking of teacher autonomy and professionalism as discourses in South African education policies. Such rethinking would be in terms of language, discourse and text in South African education policy documents. The philosophical challenge of rethinking teacher autonomy and professionalism do not consist of changing, replacing or abandoning existing knowledge on these discourses. On the contrary, with deconstruction in mind, my endeavour is to search for innovative perspectives regarding teacher autonomy and professionalism as articulated in South African education policy.

Against the backdrop of a postmodern deconstruction frame of thinking, I propose a conceptual analysis as a starting point to reveal constitutive meanings of teacher autonomy and professional from the academic literature. A conceptual analysis as a starting point can be regarded relevant, because it seems essential to reveal what discourses intend - that is to examine its conceptual and ideological schema (Derrida, 1988: 87 and 1978: 279) to uncover multiple meaning. Thereafter I intend to apply *policy archaeology* as the major research

method to explore innovative perspectives regarding teacher autonomy and professionalism in South African education policy.

1.7 RESEARCH METHODS

Harvey (1990) explains that a research method refers to the manner in which empirical data is generated. It can range from asking questions, reading documents or observing particular situations (Harvey, 1990: 1 and Gough, 2000: 4). Because this study has a conceptual foundation, literature in the public domain will be sourced after which South African education policy documents will be analysed by means of policy archaeology.

1.7.1 Conceptual analysis

I am of opinion that conceptual analysis, in the context of this study is important, because it has the potential of showing multiple uses and meanings (*vide*: Burbules & Warnick, 2003: 3) of the concepts of “teacher autonomy” and “professionalism”. When Adams (2004: 11) illuminates on constitutive meanings of conceptual analysis, he starts by asking: “What is conceptual analysis?” Considering such a question quite relevant, I shall attempt to answer this question by providing a discussion as well as an assessment of the point (purpose) of conceptual analysis.

1.7.1.1 Central features of conceptual analysis

Conceptual analysis is an investigation of concepts, terms, variables, constructs, definitions, assertions, hypothesis and theories (Petocz & Newbery, 2010: 126). It involves examining the latter for clarity and coherence and critically scrutinising their logical relations. A conceptual analysis may therefore assist in elucidating on the fundamental characteristics of concepts and also has the potential to clarify the design of concepts.

To obtain clarification regarding the meaning of concepts, an analysis thereof is critical. McLaughlin (2000) describes an analysis of concepts as:

“The elucidation of the meaning of any concept, idea or unit of thought that we employ in seeking to understand ourselves and our world, by reducing it, breaking it down into more basic concepts that constitute it and thereby showing its relationship to a network of other concepts or discovering what the concept denotes” (McLaughlin, 2000: 445).

From the prior view, it seems to me as if conceptual analysis appears to search for logically necessary conditions for the use of a concept, whilst it is also vital to note that the meaning of a concept can be understood in relation to other concepts (*vide*: Hirst & Peters, 1998: 32). I argue that one therefore needs to have clarity of concepts before we can assess them. Analysing a concept should thus not be regarded the same as defining a word. Analysis is ultimately concerned with the clear articulation of ideas and understanding of concepts rather than only attempting to provide definition of concepts (Hirst & Peters, 1998: 32).

Concepts are particular types of words that play a key role in formal processes of knowledge acquisition, formation and transfer (Du Toit, 2005: 424). Therefore, because academic language contains many concepts or is strongly conceptual, the discourses of academic disciplines are highly formalised and relatively enduring over time and across cultures. In every academic discipline one can thus point to a number of key or central concepts that are relatively stable beacons belonging to a specific discipline or school of thought (Du Toit, 2005: 424). Such concepts (Du Toit, 2005: 424-425), for example the philosophical concept *existence* within the sub-field of philosophical existentialism, usually have very specific, technical and refined meanings. The meaning of *existence* can only be fully appreciated if one knows the context from which this concept emerged, namely that of early 20th century German and French existentialist philosophies. Researchers would thus excavate the origin of the concept *existence* and then orient themselves to the field of ongoing conversation about different meanings of the concept in order to be able to make an independent and meaningful contribution (Du Toit, 2005: 425).

On the other hand, Hirst & Peters (1998) assert that when a concept like *punishment* is analysed, the principle or principles that govern the appropriate use of such a word, is examined (Hirst & Peters, 1998: 29). If the governing principles can be made overt, the concept has been exposed. The uncovered principles can also be referred to as logically necessary conditions for the use of the word *punishment*. A logically necessary condition for

the use of the latter word is that something that is not pleasant should be done to someone. If someone, however, has murdered another person, but is being congratulated and praised for such deed, then we would refuse to apply the word *punishment*. The action of inflicting something unpleasant, therefore, forms part of the concept of *punishment*. Conceptual analysis thus appears to consist in searching for logically necessary conditions for the use of a word (Hirst & Peters, 1998: 30-31).

Considering the above discussion, I want to make the point that an understanding of a concept thus covers both the experience of grasping a principle and the ability to discriminate and use words appropriately. After all, to grasp a principle means to have an understanding of what makes a concept what it is, that is, its constitutive meaning or rule (Taylor, 1985: 137).

1.7.1.2 Constitutive meanings

In his conceptual analysis of institutional culture, Van Wyk (2008: 1) states that a different, but related way of exploring a concept is to build constitutive meanings. Thus, “*when a concept is analysed, the researcher tries to absorb or get inside the viewpoint it represents as a whole and then develop a deep understanding of how its parts relate to the whole*” (Neuman, 1997: 68). The meaning of a concept can therefore not be considered simple or obvious.

In terms of the afore-mentioned, I am of the opinion that constitutive meanings seem to be the basic ideas in terms of which meanings must be analysed. In other words, there have to be shared understandings of what constitutes *teacher autonomy* and *professionalism*. In view of the latter and taking my cue from Taylor (1985: 22) three articulations for the use of concepts can be considered relevant to this study. Firstly, meaning for the education profession, which, when applied to *teacher autonomy* and *professionalism*, refers to the meaning of these concepts for teachers, educationists and researchers in education, amongst others. Secondly, meaning of something, where one would be able to distinguish between *teacher autonomy*, *professionalism* and their meanings. Thirdly, things have meaning in relation to other things in the field, meaning that changes in other meanings in the fields of *teacher autonomy* and *professionalism* can involve changes in the given concepts.

Taylor's (1985) prior views on constitutive meanings link conceptual analysis to a reflection on the fundamental ideas that underlie human experience. In the words of Gyekye (1997: 7): "*The critical and systematic examination of the fundamental ideas underlying human experience, involving the clarification of those ideas, is usually referred to as conceptual analysis*". Considering Gyekye's view (1997), I become interested to know: "**Why do I deem conceptual analysis relevant to this study?**"

1.7.1.3 The relevance of conceptual analysis

Conceptual analysis is crucial for orienting myself to my chosen field of research. At the most fundamental level, conceptual analysis is an attempt to become conversant with the basic tools of thinking and understanding, namely language, terms, ideas and concepts (Du Toit, 2005: 425). In order to gain deep understanding of concepts, researchers need to stand back from language and not try to look right through it to whatever they think is referred to by concepts. Researchers thus need to: "*bend their focus away from the object of analysis and back onto their own thinking processes in order to become self-consciously aware of the apparently transparent or neutral tools of thinking, understanding and grasping the world that, understands the key concepts of the research field*" (Du Toit, 2005: 425). Taking Du Toit's recommendation (2005) into account, I consider conceptual analysis relevant because of the following two reasons.

Firstly: "*The meaning of a concept that emerges from the analysis of its actual use is potentially very rich and multifaceted*" (Du Toit, 2005: 428). I contend that a conceptual analysis of *teacher autonomy* and *professionalism* may be a starting point to open up multiple meanings of these discourses that I can use in the course of this study.

Secondly: "*The exercise of conceptual analysis creates a consciousness of and sensitivity to the conceptual field in the researcher*" (Du Toit, 2005: 428). This implies that I may pick up conceptual clues and links which may consequently enable me to develop a richer vocabulary for dealing with *teacher autonomy* and *professionalism*.

By offering the above reasons as to why conceptual analysis is relevant to this study, I realised that I actually have spoken about the mentioned research method from a postmodern deconstructive point of reference. By this I mean that my intention is to integrate existing

constitutive meanings with new meanings of the concepts of teacher autonomy and professionalism in order to reconstruct my thinking regarding the mentioned discourses from a different paradigm. Thus, from a postmodern deconstructive point of view, my intention is not to give up on the so-called “truth” in terms of meanings already constitutive of teacher autonomy and professionalism. Rather, my intention is to disturb existing “truths” so as to be able to transgress to innovative perspectives regarding the discourses under study. I am convinced that such utilization of conceptual analysis is commensurable with a policy archaeology of South African education policies.

A conceptual analysis of *teacher autonomy* and *professionalism* will thus be essential to: “*get a clearer picture about the types of distinctions that words have been developed to designate. And these are important in the context of other questions which we cannot answer without such preliminary analysis*” (Hirst & Peters, 1998: 33). In my view, a conceptual analysis of the mentioned concepts is important as a starting point to answer the questions: ***how can a policy archaeology of South African education policy contribute to innovative perspectives regarding teacher autonomy and professionalism?***

1.7.2 POLICY ARCHAEOLOGY

Informed by what he calls his “intersection with Foucauldian post-structuralism”, Scheurich (1997) has written an instructive account on policy archaeology as a research method and its relevance to policy analysis (Gale, 2001: 387). In his illumination, policy archaeology spans out four broad arenas that can be applied to education policy analysis. These arenas can be expressed as: (i) the social construction of specific education and social problems; (ii) the identification of a network of social regularities that make the emergence of a policy agenda possible; (iii) the social construction of the range of acceptable policy solutions; and (iv) the social functions of policy studies. These four arenas are briefly explained below.

1.7.2.1 Arena 1: Social construction of specific education and social problems

Refusing the acceptance of the social construction of problems as natural occurrences, policy archaeology closely and skeptically examines the emergence of a particular problem (Scheurich, 1997: 107-108). The problem naming process is studied and the grid of conditions, assumptions and forces that lead to the definition of social/ education problems

are investigated. During such a study, policy archaeology posits that education problems are social constructions and as such, it critically examines the social construction process. An investigation is launched into how the education problem “*manifest, is made nameable and describable*” (Foucault, 1972: 41). In sum, this arena disrupts the notion that problems “just happen”. It seeks an historical analysis and explores the way in which the state, experts, professionals and policy analysts speak about problems.

1.7.2.2 Arena 2: Social regularities

This arena focuses on the identification of the network of social regularities which require that the rules of determining a discursive formation, which constitute policy discourse, be mapped (Scheurich, 1997: 98 and Heywood, 2002: 79). Social regularities are like pre-conceptual glasses or frames through which human actions and categories become socially defined. Defined as patterns of thought and ways of thinking that permeate policy processes, four points about social regularities can be made that can be considered relevant in this arena (Scheurich, 1997). Firstly, the regularities are not intentional in the sense that no particular individual or group consciously create them (though some individuals benefit from them). Secondly, regularities constitute, rather than set the conditions in which action is taking place. Thirdly, regularities change and may even disappear or being re-created. Fourthly, regularities operate largely below the surface and as such, social agents may or may not be aware of the social regularities that inform their subjectivities and practices.

1.7.2.3 Arena 3: A range of policy choices and policy solutions

The social construction of the range of acceptable policy solutions are studied in this arena. The process in this arena is to study how the grid of social regularities generates a range of possible policy choices. During such a study it is assumed that the shaping of choices is not intentional or conscious (Scheurich, 1997: 109-110). The idea would be to uncover the foundational (less changing) categories with the formational (more circumstantial) categories to create a multi-formational archaeology that allows for the understanding of a particular situation being constituted by one formation rather than another (Scheurich, 1997: 108).

1.7.2.4 Arena 4: The social function of policy studies

This arena involves a study of the social function of policy studies itself. Rather than collecting data, this arena calls for policy analysis in order to reflect on the social function of policy studies within the wider social order (Scheurich, 1997: 110-112). Such a reflection would involve questioning the function of a policy analysis process in order to determine how it occurs.

Scheurich (1997) points out that all the arenas have permeable boundaries. This implies that the policy archaeology process is recursive and iterative. Work in one arena may refashion or alter what has already been done in another arena. Also, there is no specific order in which a policy archaeologist should conduct an analysis - any order is possible (Scheurich, 1997: 102).

Of significance regarding these four arenas is Scheurich's (1997: 115) acknowledgment that "[t]here is much structuralism in my "post-structuralism, just as there is much structuralism in Foucault's works". For Scheurich the presence of structuralism in policy archaeology is inescapable as post-structuralists need structuralised views to question the structural-functional concepts underlying mainstream meanings of discourse. Simultaneously, however, Scheurich (1997: 100) also notes that there are indications of postmodernism in his policy archaeology. As such, policy archaeology allows that structuralised views can be subjected to deconstruction which will further tolerate for the execution of postmodernist freedom to reconstruct innovative perspectives and meanings about discourses under study.

Importantly, the aims of this study (*infra*: 1.5.1-1.5.5) do not allow me to apply all arenas to explore innovative perspective on *teacher autonomy* and *professionalism*. Therefore, I narrow policy archaeology down to the application of the second arena and as such, the next session will provide reasons for my decision.

1.7.3 Reasons for applying arena 2 of policy archaeology

In this study, the focus will strongly be on uncovering regularities to expose innovative perspectives regarding teacher autonomy and professionalism in South African education

policy. I consider the uncovering of regularities as critical, because policy archaeology strongly argues for the mapping of:

“Rules of formation or discursive systems... In a technical sense, it proceeds at the level of statements (enounces) searching for rules that explain the appearance of phenomena under study. It examines the forms of regularity, that is, the discursive conditions, which order the structure of a form of discourse and which determine how such orders come into being” (Olssen et al., 2004: 46).

In this way, policy archaeology, as Foucault designates it, renders a certain form of thought regarding discourse under study. Alvessen & Skoldberg (2000: 224). Engaging with the latter authors, I contend that an exploration of the seemingly unconsciously organised sediments of thought lies hidden in education policy discourse. Thus, in my application of policy archaeology, statements in South African education policy will be “opened up” to gain new insights into how innovative perspectives on teacher autonomy and professionalism may be unearthed. Whilst an exploration into innovative perspectives requires a transformation of ways of thinking, I, like Waghid (2002: 459), argue that one should envision new knowledge production, seeing new problems and imagining new ways of approaching old problems or exploring beneath surface appearances in appeal to structured versions of existing knowledge.

Innovative ways of thinking and knowledge production are complementary to arena 2. Working with regularities can be considered relevant, because a postmodern deconstruction methodology does not allow me to focus on discourse with “particular” meanings (like in arena 1) or to search for ultimate “solutions” (like in arena 3). Postmodern deconstruction rather undercuts every quest for certainty. I also do not want to give a historical account of educational events, but intend to analyse current stipulations in South African education policy to uncover innovative perspectives regarding teacher autonomy and professionalism. Furthermore, I have no interest in determining the role of policy studies in the wider social order (like in arena 4) which would imply a comparative study regarding policy archaeology, conventional and post-positivistic policy studies.

The latter views in mind, I do not claim to be the only person who has made an exception regarding the application of arena 2 of policy archaeology in a particular study. In his exposition of policy archaeology, Gale (2001) notes:

“Here I want to focus on those parts of policy archaeology that tries to establish the rules of [policy] formation. I suspect that I take this to mean a little less than Scheurich – that is, I restrict policy archaeology to the analysis of constitutive rules and position the conditions of their realization” (Gale, 2001: 387).

Gale (2001) explains that his exception in applying arena 2 is based on his intention to conduct a policy genealogy. Genealogy investigates discourse with their specific problems and solutions relative to a particular historical time (Kethoilewe, 2007: 76). Consequently, ten years after Gale’s study, Erratt (2011) explicitly emphasises the importance of the application of regularities (arena 2) to analyse education policies relating to education of children with disabilities throughout the world. He emphasises the critical use of regularities as:

“Scheurich acknowledged the complexities in identifying social regularities and the multiple interpretations and understandings of education policy when analysed through the lens of policy archaeology (Erratt, 2011: 5).

The author then formulated all his research questions around the idea of regularities in an attempt to conduct a policy archaeology.

However, the application of arena 2 (regularities) in this study is rather unique, because never before were regularities used to analyse South African education policy to uncover innovative perspectives regarding teacher autonomy and professionalism. As such, like the prior authors, I probably: *“disturb the habit of making method definitive”* (vide: Harwood, 2000: 58). By this I mean that, by applying only the second arena of policy archaeology, I would move beyond the straight-jacketing confines of methodological rules that usually offer step-by-step guidelines to investigate discourse under study. In this, I seek intellectual freedom whilst remaining partly within and respecting the intensions of policy archaeology. In doing so, I do not dogmatically follow Scheurich’s model, but I engage respectfully with the author, whilst looking to and building on the insights of different academia. Having said the latter,

the next section will be a deliberation of how I intend to apply Scheurich's second arena of policy archaeology.

1.7.4 My understanding of applying Arena 2 of policy archaeology

Policy archaeology proposes that a network of regularities can be identified and utilised (Scheurich, 1997: 99). Trying to understand the meaning of regularities at first hand, I consulted Foucault (1973) when he said the following about regularities:

“It is these rules of formation which were never formulated in their own right, but are to be found only in widely differing theories, concepts, and objects of study, that I have tried to reveal, by isolating, as their specific locus, a level that I have called ... archaeological” (Foucault, 1973: ix).

Explaining himself, Foucault indicates that regularities are not universal and immutable in character or grounded in the structure of the mind. Regularities change over periods of time and can be regarded specific to given discursive domains (Foucault, 1973: ix). In line with the latter views, Scheurich (1997) proposes that four points need to be made about regularities.

Firstly, regularities are not intentional (Scheurich, 1997: 99-100). No particular individual or group consciously created them, but it does not mean that an individual or group may not benefit from them. Regularities are productive and reproductive without the need for conscious or intentional agency. For the policy analyst regularities are part of the scientific (policy) discourse. Regularities, then, constitute categories of thought and ways of thinking about discourse under study. Secondly, regularities constitute the set of conditions in accordance with which a practice is exercised (Scheurich, 1997: 100). This implies that regularities can be considered to be fundamental codes which construct the *episteme* or configuration of knowledge that determines the orders and social practices of a particular era. Thirdly, regularities are historical (Scheurich, 1997: 101). Regularities that are to be identified are not the same throughout all time. Although particular regularities may remain the same, historical shifts may lead to shifts in the grid of regularities. For example, *gender*, according to Scheurich (1997), is one such regularity that has remained the same over periods of time. Fourthly, regularities can be identified within the context of human activity, but they

are not necessarily within the awareness of social agents (Scheurich, 1997: 101). They (social agents) are thus not necessarily aware of the regularities that inform their subjectivities and their practices.

The prior exposition about regularities implies that: “*things can no longer perceived, described, expressed, characterised, classified and known in the same way*” (Foucault, 1973: 217). I take this view to mean that similitude is no longer the form of knowledge production regarding discourse under study. Furthermore, this view is also in line with my research methodology in the sense that: “*texts, institutions, traditions, societies, beliefs and practices of whatever size and sort you need - do not have definable meanings... that they exceed the boundaries they currently occupy*” (Caputo, 1997: 31).

Consistent with the preceding interpretation, I want to make three points about regularities relevant to this study. Firstly, “*the configuration of knowledge that determines the orders and social practices occurs in a particular era*” (Scheurich, 1997: 101). The particular era in this study will refer to South African education policy in a globalised context. Secondly, “*regularities constitute categories of thought and ways of thinking about discourse under study*” (Scheurich, 1997: 99). I intend to search for regularities in South African education policy to uncover innovative perspective regarding the discourses of teacher autonomy and professionalism. Thirdly, “*social agents are not necessarily aware of the regularities that inform their subjectivities and their practices*”.

Teachers may not necessarily be aware as to how their educational practices are regulated by education policy. Consequently, the constructed innovative perspectives may therefore be utilised to empower teachers regarding their professional autonomy.

Next, I shall break down the discussion on regularities into two parts which will elaborate on my application of arena 2. The first part will focus on *regularities in South African education policy*, whilst the second will pay attention to *a policy archaeology of South African education policy*.

1.7.4.1 Regularities in South African education policies

According to Vongalis-Macrow (2007: 425-426), the 1990's presented a new era for teachers which include a global dimension to the way their profession was reconceptualised. Globalisation couched the teaching profession in such a way that one of the aims of education was to enhance human and social capital. As such, within the global economic terrain, new ways to fit education and teachers were sought. From the 1990's onwards, educational policy in a globalised context has focused on redefining teachers as adaptive and responsive professionals in the context of educational change (Vongalis-Macrow, 2007: 426).

After 1994 South African education policy was formulated to be in line with the form and function of globalisation. In this regard “[i]t is our task both to understand the impact of globalisation in our context and to formulate a vision with which to positively interact with the emerging system” (Department of Education, 2000a: Chapter 1, Section 1.1). Within this view: “*The Ministry regards teacher education (including the professional development of education of trainers and educators) as one of the central pillars of national human development strategy, and the growth of professional expertise and self-confidence is the key to teacher development. The responsibility of the national level of government is to provide facilitative and regulatory mechanism under which institutions and bodies responsible for programmes will have wide latitude to design and deliver them*” (Department of Education, 1995: Chapter 5, Section 40). These stipulations explicitly indicate the intention of the education department to regulate teacher agency and teacher development, amongst others. Arguably, the use of “*government is to provide facilitative and regulatory mechanism*” in the education policy document gives substance to the prior argument as to how government intends to regulate teacher agency.

If teacher agency is to be deconstructed, three interconnected aspects emerges which Vongalis-Macrow (2007: 428) refers to as obligation, authority and autonomy. As teachers' agency are being re-territorialised within global education systems, the reassembling of their obligations, authority and autonomy creates a distinct of issues which need a different way of understanding in global contexts. With respect to teachers' agency, my interest is in teacher autonomy and professionalism. Unpacking teacher autonomy within a globalised context, one may find that education policy intends to render teachers as professionals that can be repositioned and regulated to do things differently within a new education landscape

(Vongalis-Macrow, 2007: 432). Because teachers are also considered professionals, Britzman (2000: 204) recommends that we must rethink what goes under the name of professionalism as well as how teacher autonomy is affected by policy in global contexts.

Professionalism has been increasingly used by policy-makers in a dual way (Wang, 2012: 20). On the one hand professionalism has been interpreted as a way to achieve some unquestionable compliance to directives – thus how teachers should conduct professional practices. On the other hand, there is also an alternative tradition of teacher empowerment which interprets professionalism in such a way that greater emphasis is placed on teachers' own responsibility for controlling teacher practices. Interpreting this dual view, I regard professionalism as a tool used to control or empower teachers.

The afore-going two paragraphs provide a tip-off regarding the intertwinement of teacher autonomy and professionalism. Because both these discourses are perceived as socially constructed and contested concepts (Troman, 1996: 473), it strengthens my endeavour to identify regularities in South African education policy in a globalised context to uncover innovative perspectives regarding teacher autonomy and professionalism (*infra*: 1.2).

South African education policies will thus be scrutinised. The purpose would be to accumulate, analyse and categorising useful information to identify regularities that may be used as frames of analysis to conduct a policy archaeology. In this sense, Foucault compares the identification of regularities to:

“The seeds of the aconite plant that are tiny dark globes set in white skin-like coverings resembling human eyes and, hence, are taken to be signs of our eyes and used as ocular medicine” (Foucault, 1994a: 27).

By making such comparison, Foucault only emphasises that regularities exist, but that it remains hidden: *“while waiting in silence for the moment of its expression”* (Calvort-Minor, 2010: 5). I argue that when hidden regularities are brought into the open, I shall be able to use them to conduct a policy archaeology of South African education policies.

1.7.4.2 Policy archaeology of South African education policies

Educational reform in South Africa since 1994 has seen significant moves away from the post-apartheid system of education. The process of reform has been guided by the development of new policy frameworks based on, amongst others:

“An integrated approach to education and training based on a national qualifications framework, the restructuring of school ownership, governance and finance, the introduction of a new curriculum underpinned by outcomes-based education, the establishment of new education management structures” (Department of Education, 2000a: Section 3).

New policy frameworks as indicated by the prior stipulation are grounded in a compendium of regulatory arrangements and legislative statements (Jansen, 1999: 44). Such regularities, which are never explicitly indicated, seem to direct where schools should go and what teachers should do. It should be bore in mind that regularities are not formulated overtly, because it is found to be constantly changing and specific to given discourse domains (Foucault, 1973: xi). For me this is a clear indication that regularities are not universal and immutable in character and are therefore not explicitly indicated. I therefore contend that, by exposing regularities (as described in the previous section) spaces will be created to explore how teacher autonomy and professionalism are articulated in South African education policy documents. To conduct an analysis of this kind, I previously indicated that discourses in South African education policy be analysed by means of policy archaeology. Before deliberating on how policy archaeology will enable me to analyse discourses in education policy, I am convinced that it would be relevant to give an overview of what *discourse* refers to.

The term *discourse* signifies both the formal system of signs and the social practices which govern their use. In this sense, discourse refers not only to the meaning of language, but also to the real effects of language-use, the materiality of language (Ollsen, *et al.*, 2004: 65). As noted by Taylor (1997: 23-35) “[discourses]... *shape social categories, position people within them, and mould the categories of citizenship through which people are brought into particular relationships with the state and politics*”. Within this view and because people participate in a range of discourses, I contend that there are manifold ways in which they can

signify and represent the conditions of their lived experience. This view does not separate discourse from subjective experience. Rather, discourse itself is constitutive of subjective experience and is also a material force within the construction of subjectivity (Ollsen *et al.*, 2004: 65).

The force that is exercised through discourse is a form of power “*which permeates the deepest recesses of civil society and provides the material conditions in which individuals are produced both as subjects and as objects*” (Ollsen, *et al.*, 2004: 67). It is this kind of power which is exercised through the discourses of the law, medicine, psychology and education. These discourses, however, are more than texts. They constitute material social practices, and as such they both mediate and constitute relations of power. In education, the education system is controlled by the state, but it works to maintain relations of power throughout the society as a whole. For this reason the official discourse of the state relating to educational policies are obvious instances in which discourse becomes an instrument and object of power (Ollsen, *et al.*, 2004: 67). An analysis of discourses aspires to expose power relations in South African education policies and how teacher autonomy and professionalism are articulated in these policies.

Thus, while conducting a policy archaeology, I am of the same opinion as Fairclough (1989) who posits: “*one is committing oneself not just to analysing texts, nor just to analysing processes of production and interpretation, but to analysing the relationship between texts, processes, and their social conditions*” (Fairclough, 1989: 26). Embedded in such an analysis is the unpacking of different assumptions, rules, names and meanings that can be associated with teacher autonomy and professionalism. Such unpacking is geared towards an archaeological excavation into South African education policies and it is in line with postmodern deconstruction. Thus, by applying policy archaeology, I shall be in a position to negotiated and re-negotiated meanings of texts in education policies. Such probing is critical, because South African education policies are, like other policies, “*set within a moving discursive frame which articulates possibilities and probabilities of interpretation and enactment*” (Ball, 1993a: 15). Therefore, policy archaeology will enable me to dig deep, quarry and extract information in an attempt to explore how teacher autonomy and professionalism are articulated in South African education policy.

1.7.4.3 The point of policy archaeology

Policy archaeology takes a radically different approach to policy studies and is entirely dissimilar than conventional and interpretive policy analysis.

Conventional policy analysis seems to be characterised by a concern for providing explanations of the status quo, social order, consensus, social integration and actuality, amongst others (O'Connor, 2005: 3). In such an approach, conventional policy analysts seek to provide essentially rational explanations of social affairs. It is thus pragmatic, problem-oriented, seeking to apply models and methods of the natural sciences to studies of human affairs. As such, there is an assumption that the social world is composed of relatively concrete empirical artefacts and relationships which can be identified, studied and measured through approaches derived from the natural sciences (O'Connor, 2005: 3). Following the latter assumption, conventional policy researchers assume that a social problem, for which a policy solution is needed, is like a disease (Scheurich, 1997: 95 and O'Connor, 2005: 4). While there may be, in their view, *a priori* condition that can be said to be the cause of the disease, they argue at some point the disease requires either a real or symbolic treatment. This implies that conventional policy analysts tend to identify a specific policy problem and also search for a policy solution. The prior knowledge in mind, conventional policy studies typically encompasses one or more of four areas: (i) description of social problems; (ii) discussions of competing policy solutions; (iii) considerations of general implementation problems; and (iv) evaluation of particular policy implementations (Scheurich, 1997: 95).

The first area entails a description of social problems and a discussion of possible causes for the problems. For example, policy researchers report on the demographic characteristics of students failing in schools with the purpose of indicating the causes of the problem of failing students. During the application of the second area, policy researchers may discuss different policy solutions. Here policy researchers might compare data generated from failing students with that of information obtained from families and friends, amongst others. Within the third area, policy researchers study policies already implemented to consider possible problems in implementation. In the fourth area, policy researchers evaluate the effectiveness of policy implementation. For example, policy researchers might evaluate whether or not a programme intervening with both the failing students and their families actually decreases the failure rate of such students (Scheurich, 1997: 95).

Building on conventional policy analysis, alternative paradigm policy analysts (cf, amongst others: Kingdon, 1994; Guba, 1995 and Stone, 1997) have developed frameworks lodged in a more interpretive paradigm. An interpretive perspective is informed by a concern to understand the world as it is and to understand the fundamental nature of the social world at the level of subjective experience (O'Connor, 2005: 4-5). For me, the prior view signifies an understanding of the choices which are assumed to be based on influence. The influence that is referred to is geared at what is perceived to be "good" while avoiding what is "bad". A further assumption is that policy decisions are made with clarity and reason, whilst the range of problem definitions is sought along with the range of goals and acceptable solutions. Within what is seen as acceptable are those solutions that is geared towards consciousness raising and education.

Whilst neither approaches questions the basic social order, both conventional policy analysis and interpretive approaches focus on the democratic ideal of improving the social order (O'Connor, 2005: 6). Unlike conventional and interpretive policy approaches which is rational and based on the search for solutions to problems (O'Connor, 2005: 3), policy archaeology argues for a different approach to policy studies in virtually all its aspects (Scheurich, 1997: 97). Rather than assuming that policies are construed through a rational interplay between problems, solutions and studies regarding both, policy archaeology provides: "*A perspective or lens that preordains what will be seen*" (O'Connor, 2005: 10). This signifies that difference in the meaning of discourse is made manifest during an analysis texts in policy documents. Therefore, policy archaeology represents a different approach in understanding how perspectives regarding discourse can be made nameable. From this there is a different approach to discussions of policies and policy alternatives.

Policy archaeology, within postmodern deconstruction, would thus allow for the possibility to "*think differently, instead of legitimating what already is known*" (Foucault, 1985: 9) about how teacher autonomy and professionalism are articulated in South African education policy. For example, teacher autonomy and professionalism are not some universal, fixed and unchanging realities. These discourses vary in relation to time and place that is constantly mutating in relation to its connections to a plethora of historical, social, cultural, economic, psychological and pedagogical forces. In this context, I assert that single meanings of teacher autonomy and professionalism cannot be communicated as ultimate truths. Therefore, I intend to explore and analyse South African education policy from different angles and

employ multiple research ideas to examine different aspects of the afore-mentioned discourses. In view of the preceding, I am in harmony with Denzin & Lincoln (2000: 162) who proclaims that the researcher should be “*one who sought multiple ideas to provide richness and depth to a study*”. Thus, by applying the second arena of policy archaeology, I subsequently aim at providing richness and depth to explore how teacher autonomy and professionalism are articulated in South African education policy. Although I intend to provide a broader elucidation later (Chapter 3), I deem it necessary to trigger the taste buds by providing some pointers as to how I intend to apply Arena 2 of policy archaeology.

Firstly, I shall focus on what might be called a discursive analytic; a way to approach South African education policy text through the location of enunciations or statements that function with constitutive effects. Foucault privileges the “statement” extracted from the “simple inscription of what is said” (Deleuze, 1988: 15). He describes the statement, not as a linguistic unit like the sentence, but as a “function” (Foucault, 1972: 98). The statement, as function, can be theorised as a discursive junction-box in which words intersect and become invested with particular relations of power, resulting in an interpellative event in which one can recognise an act of regularity (Foucault, 1972: 93).

Secondly, I shall be in a position to make the regularities nameable and describable. I want to emphasise that the elucidation of regularities constitute categories of thought and ways of thinking (*vide*: Foucault, 1973: xi). By this I mean that regularities unlock thinking patterns to analyse discourse in education policy.

Thirdly, I intend to apply the regularities to analyse South African education policies in the search for innovative perspectives regarding teacher autonomy and professionalism. This means that I shall search beyond the boundaries of meaning and try to disrupt present meanings *vis-à-vis* the afore-mentioned discourses.

These preceding pointers are in line with a postmodern deconstruction methodology in the sense that it enables me to take apart South African education policy texts, to exhibit its foundations and: “*to think again and afresh*” (Biesta, 2001: 34) about teacher autonomy and professionalism.

1.8 SOUTH AFRICAN EDUCATION POLICIES TO BE ANALYSED

Education policy can be regarded as both text and discourse (Ball & Shilling, 1994: 15 and Ricoeur, 1991: 106). A text is any discourse fixed in writing and to understand a text properly, an analysis of words, clauses and structures of texts are deemed necessary. The analysis of education policy is essentially a kind of interpretation with the intention to describe, interpret, explain and produce meaning out of policy within specific contexts. In line with this study, South African education policies in a globalised context will be analysed to explore innovative perspectives regarding teacher autonomy and professionalism.

The core mission of the South African Department of Education since 1994 has been to transform the national education and training system inherited from the past. This mission has been consciously framed by the imperatives of contributing towards building a democratic nation and responding to the challenges of the global era. One of the mission statements of the Department of Education was: *“to establish a system of lifelong learning that will develop the knowledge, skills and competencies required to facilitate innovation, social development and economic growth in the 21st Century”* (Department of Education, 2000a: Section 1.3). Woven into such a statement is the development of a new policy framework for the overall project of educational reform. Educational reform in the light of globalisation highlights:

“accountability, transparency and efficiency ... a new culture and ethos within the public service where passivity is replaced by active engagement and a sense of purpose, empathy, pride and professionalism ... and the development of knowledge and information systems” (Department of Education, 2000a: Section 7.1).

Such education policy imperatives imply a constant re-conception of what it means to be a teacher in South Africa, specifically regarding teacher autonomy and professionalism. In my endeavour to explore innovative perspectives regarding the mentioned discourses I propose that three South African education policy documents be examined.

The education policies I have chosen to analyse are: *Norms and Standards for Educators (2000)*, *National Framework for Teacher Education, Development in South Africa (2006)* and

Continuing Professional Teacher Development (CPTD) System (2008). Although a compendium of education policies is available in South Africa, it is impossible to analyse them all, because not all are specifically regulative in terms of teachers' roles in South African education. For instance, one of the main objectives of *The Language in Education Policy (1997)* is to: “develop programmes for the redress of previously disadvantaged languages” (Department of Education, 1997a: Section 4.3.6). This stipulation is an indication of what the South African Department of Education (and schools in general) should do to promote multi-lingualism and does not hint on teachers and their roles in education. Therefore, the three mentioned education policy documents were chosen, because they provide a close picture of educational development in South Africa and are undoubtedly informative with respect to teacher roles, autonomy and professionalism, amongst others. Furthermore, these documents offer an indication of the requirements to be a teacher in this country and include expected or desired qualities for teacher improvement. I am convinced that such regulative requirements have significant influences on the discourses of teacher autonomy and professionalism.

I got access to all these documents from the official website of the South African Department of Education. Needless to say, it is impossible for this study to cover all the relevant texts in the chosen documents. I thoroughly analysed as much texts I could and chose to use those which, according to me, more strongly hints on regulation in terms of on teacher autonomy and professionalism. Therefore, I am convinced that texts to be analysed would be adequate and suffice for a comprehensive analysis to uncover innovative perspectives regarding teacher autonomy and professionalism.

In view of the preceding, I shall henceforth provide an overview of the three South African education policy documents that will be analysed by means of policy archaeology.

1.8.1 Norms and Standards for Educators (2000)

Prior to 1994, the system of teacher education was driven by the political logic of the apartheid system which sought to provide separate forms of education for different racial and ethnic groupings. Thus, until 1998 there was no national system of registration for teacher education programmes in South Africa, and by implication, no quality assurance of programmes (Robinson, 2003: 19). The establishment of a regulatory framework for teacher

education programmes began in 1995, published for discussion in 1998 and gazetted as the *Norms and Standards for Educators* in 2000.

The new policy creates a framework and procedure for the approval of teacher education programmes and outlines the kinds of qualifications that the Department of Education would consider for funding and employment. It also provides an outline of the knowledge, skills and values that are seen as the hallmarks of a professional and competent educator. The cornerstone of the policy is the identification of seven roles for educators: (i) mediator of learning; (ii) interpreter and designing of learning programmes and materials; (iii) leader, administrator and manager; (iv) scholar, researcher and lifelong learner; (v) community, citizenship and pastoral role; (vi) assessor; and (vii) learning area/subject/discipline/phase specialist (Department of Education, 2000b: 13). These roles, according to the Department of Education (2000b: 13) are meant to serve as a description of what it means to be a competent teacher in South Africa.

Morrow (2007: 11) assert that “*the description of what it means to be a competent teacher*” is context blind. Morrow (2007) explains that: “*we are embrangled at the intersection between a concept of what it is to teach and the institutional and other contextual realities of the situations in which those whose professional task is to teach to try to carry out this activity*” (Morrow, 2007: 11). Within this view, there is an intersection between the idea of teaching, the roles and responsibilities ascribed to teachers and the conditions in which they are expected to carry out the prescribed roles stipulated in the *Norms and Standards for Educators* (2000).

The characterisation of teachers’ work as indicated in the prior paragraphs may contribute to acute professional guilt and an inhabitation of teachers’ independence and autonomy (Morrow, 2007: 11). Interesting in this regard is a recommendation in the *Norms and Standards for Educators* that: “*teachers must be empowered to be autonomous, flexible, creative and responsible agents of change in response to the educational challenges and in relation to the espoused aims of education in South Africa*” (Department of Education, 2000b: 13).

An analysis of the *Norms and Standards for Educators* (2000) is thus relevant to uncover innovative perspectives regarding teacher autonomy and professionalism. Closely in tandem

with this policy is the *National Framework for Teacher Education and Development in South Africa (2006)*. The afore-mentioned policy draws on the principles contained in the *Norms and Standards for Educators (2000)* and its complementary aim is to provide an overall strategy for the professional development of South African teachers (Department of Education, 2006: Section 5). Subsequently, the *National Policy Framework for Teacher Education and Development in South Africa (2006)* will be discussed next.

1.8.2 National Policy Framework for Teacher Education and Development in South Africa (2006)

The policy for teacher education and development in South Africa is designed to develop a teaching practice ready and able to meet the needs of a democratic South Africa in the 21st century (Department of Education, 2006: Section 1-2). The *National Policy Framework on Teacher Education and Development (NPFTEd) (2006)* seemingly brings clarity and coherence to the complex but critical matrix of teacher education activities, from initial recruitment as a student teacher, throughout the professional career of a teacher. The overriding aim of the policy is to:

“Properly equip teachers to undertake their essential and demanding tasks, to enable them to continually enhance their professional competence and performance, and to raise the esteem in which they are held by the people of South Africa” (Department of Education, 2006: Section 1).

In view of this stipulation, teachers are to be acknowledged as the largest single occupational group and profession in the country. Therefore, although educational changes occurred during the past decade, their role has strategic importance for the intellectual, moral and cultural preparation of young South Africans (Department of Education, 2006: Section 8).

It is therefore expected from teachers in this country to cope with many large-scale changes since 1994. Such changes involve: *“cultural and linguistic composition of classrooms, and the introduction of a new curriculum that emphasises greater professionalism and expects teachers to have new knowledge and applied competencies”* (Mahomed, 2009: 160). This view unlocks the perception that teachers should take responsibility for self-development by identifying educational opportunities in which they want to grow professionally. This is

confirmed in South African education policy in the sense that: “*the professional education and development of teachers work best when teachers themselves are integrally involved in it, reflecting on their own practices; when there is a strong school-based component; and when activities are well co-ordinated*” (Department of Education, 2006: Section 7).

In view of the preceding, it seems that the NPFTED outlines possibilities and constraints regarding teacher practices and professionalism in the teaching profession. Because of the seemingly contradictions in the policy, I consider an analysis thereof relevant to search for innovative perspectives on teacher autonomy and professionalism.

In keeping with teacher education and development, the *Continuing Professional Teacher Development (2008)* provides an expanded concept of teachers’ professional practices and will be discussed in the next section.

1.8.3 *Continuing Professional Teacher Development (CPTD) System (2008)*

The *Continuing Professional Teacher Development System (CPTD) (2008)* has been designed in terms of the Minister of Education’s *National Policy Framework on Teacher Education and Development (2006)*. This document presents a management system and an expanded concept of continuing professional development (Department of Education, 2008: 4-5). The quality of teachers’ professional practices seems to be at the root of the quality of schooling and the development of these practices is a continuing process that lasts for the duration of the career of a committed professional teacher. The underlying principle in this regard is that teachers will have a high degree of responsibility for their own professional development and the identification for their own professional needs (Department of Education, 2008: 4).

The CPTD policy framework envisages that teachers will engage in professional development activities for which they will earn professional development points over successive rolling three-year cycles (Department of Education, 2008: 9). The *South African Council for Educators (SACE)* will manage the CPTD system with the support of the Department of Education. SACE will endorse professional development activities on grounds of their fitness of purpose and quality, and in so doing ensure that professional development is purposeful and effective (Department of Education, 2008: 9).

Since this policy document emphasises teachers' willpower (autonomy) to be responsible for their own professional development, it can be regarded as relevant in the search for innovative perspectives regarding teacher autonomy and professionalism.

An analysis of the prior mentioned policy documents is in line with my research methodology, because texts are like nutshells that contain valuable information which wait to be revealed (cf: 1.6.3-1.6.4). The idea would be to crack texts open and disturb their peace in South African education policy documents in order to find innovative perspectives on teacher autonomy and professionalism. In search for such perspectives, this research can be demarcated in education policy studies.

1.9 DEMARCATION OF THE STUDY

Education policy studies can be seen as a social science activity characterised by ways of thinking and acting expressed through terms such as "inquiry", "methods", "techniques", "methodologies", "approaches", "traditions", "theories" and "paradigms" (Waghid, 2002: 41). From the preceding one should bear in mind the claim that particular frameworks of thinking (paradigms) constitute research methodology and as such it can be inferred that the paradigms can also frame education policy research (a research methodology for education policy issues). To a large extent education policy studies can be associated with educational systems (centralised and decentralised administration systems), educational structures (curriculum and teacher education) and educational crises. The latter can in turn be related to educational aid, international educational relations, educational restructuring, educational modernity as well as issues relating to the global economy (Waghid, 2002: 41).

It is a truism that education policy contains concepts that may be related to the social construction of problems. Ball (1990: 22) asserts that policies which respond to social and educational problems don't emerge in a vacuum. Policy rather aims to speak with authority, they legitimate and initiate practices in the world and they privilege certain visions and interests. Since this study asks how a policy archaeology of South African education policy can contribute to innovative perspectives regarding teacher autonomy and professionalism, it can be placed within the realm of education policy studies.

Education policy studies are relevant for this study as it can be associated with educational structures regarding teacher education, as well as with educational issues in South African education policy. After 1994, South African education policy has been restructured in line with globalisation (Cross, Mungadi & Rouhani, 2002: 171-187). Measured by international indicators of human development and economic competitiveness (Department of Education, 1995, Chapter 3: Section 9), South African education policy prescribed, amongst others the development of new knowledge, skills and technologies, responsibility for personal performance, achievement of high standards and to work cooperatively. These policy imperatives played a role in defining teachers' autonomy and professionalism in a globalised context and it is with reference to the latter that education policy studies are perceived as relevant for my research. I work with the assumption that educational policy studies will provide me opportunities to undertake policy analysis, by means of policy archaeology, that is, to determine how teacher autonomy and professionalism are articulated in South African education policy.

To further strengthen the scientific demarcation of my study, reference needs to be made to the exposition of the two different strands of policy analysis, i.e. *analysis for policy* and *analysis of policy* (Codd, 1988: 235-236 and Olssen *et al.*, 2004: 72). *Analysis for policy* takes the form of *policy advocacy* with the specific purpose to provide policy-makers with information and recommendations for the revision or formulation of actual policies. *Analysis of policies* on the other hand, can involve the *analysis of policy determination and effects* and the *analysis of policy content*. Whilst the former refers to the inputs and transformational processes operating upon the construction of public policy and also the effect of such policies on various groups, the latter deals with the values, assumptions and ideologies underpinning the policy process (Taylor, Rizvi, Lingard & Henry, 1997: 151). With the foregoing in mind, this research relates to the category of *analysis of policy*, more specifically to the analysis of the context of South African education policy documents in a globalised context. As the decoding of policy texts always depend upon the social context in which they are read, I accept that it is significant to explore innovative perspectives on teacher autonomy and professionalism. However, this study also deals with the *analysis for policy* as it further has the potential to provide policy-makers and educationists with information about the way in which teacher autonomy and professionalism are articulated in South African education policy in a globalised context.

Arguing that this study deals with the analysis of South African education policy and educational issues relating to teacher autonomy and professionalism, it can be demarcated within the field of **Policy Studies in Education**.

1.10 IMPORTANCE OF THE STUDY

Within the terrain of Policy Studies in Education, this study will contribute to:

- the expansion of the edifice of knowledge to the field of Policy Studies in Education, specifically the construction of innovative perspectives regarding teacher autonomy and professionalism as articulated in South African education policy in a globalised context; and
- provide students of educational policy studies and social policy analysts generally with a policy archaeological method, and with the philosophical concepts and principles necessary for the critical analysis of educational policy in a globalised context.

1.11 ETHICAL CONSIDERATIONS

This study has a conceptual foundation and ethical issues will therefore be limited to acknowledging scholars whose writings I will consult during the study. This will be done by in text referencing as well as providing a bibliography. Literature to be sourced is already in the public domain.

1.12 CHAPTER ORIENTATION

In this chapter direction was provided as to how I want to go about in answering the research question:

“how can a policy archaeology of South African education policy contribute to innovative perspectives regarding teacher autonomy and professionalism”?

In this regard, the programme for this research will unfold as follows:

CHAPTER 2: Teacher Autonomy and Professionalism

The discourses of teacher autonomy and professionalism will be explored by means of a conceptual analysis. First, teacher autonomy is considered a central concept in this dissertation and will therefore be explored to enhance my understanding of what it may mean. During such an exploration, I intend to elucidate teacher autonomy by analysing information in the academic literature as well as from my own teaching experience. An analysis of this kind is relevant, because it is in line with my research methodology in the sense that dormant concepts will be extracted and categorised to explore what they may denote about teacher autonomy. Following the analysis, I shall place teachers in subject positions and analyse the meaning of such positions to further enhance my understanding of teacher autonomy. From a postmodern deconstruction view the latter will be significant, because meanings related to teacher autonomy can be deemed incomplete and unfinished. After all the afore-mentioned analyses, I shall be in a position to contribute to the knowledge corpus by constructing well-thought through meanings of teacher autonomy.

Furthermore, I shall use my constructed meanings to deliberate the relationship between teacher autonomy and professionalism. During such deliberation, I shall explicate on suppositions derived from discussions which will enable me to offer deconstructive insights in view of the relationship between teacher autonomy and professionalism.

CHAPTER 3: Regularities in South African education policy

In this chapter I aim to explore and interpret regularities in South African education policy in a globalised context. I intend to firstly explore how globalisation configures in South African education policies. South Africa adopted policies in line with the neoliberal dictate of the present forces of globalisation, suggesting its willingness to conform to the current global order. Globalisation therefore works both on and through education policy. This implies that not only is education policy affected by globalisation, but it also becomes a principle mechanism by which global forces regulate the educational practices of teachers (Tikly, 2001: 155). Working with the assumption that South African education policies are underscored by globalisation, the policies I have chosen to analyse are: *Norms and Standards for Educators (2000)*, *National Framework for Teacher Education, Development in South Africa (2006)* and *Continuing Professional Teacher Development (CPTD) System (2008)*.

The mentioned three policies will be analysed to explore the manifestation of regularities. Regularities constitute frames of thinking with which to articulate and consider alternative perspective of discourse under study. As such, the unpacking of regularities will be geared towards archaeological thinking in preparation to conduct a policy archaeology of South African education policy.

CHAPTER 4: Policy archaeology of South African education policy

The labelled regularities from the previous chapter will be used as criteria to conduct a policy archaeology of South African education policy. By utilising the identified regularities in the previous chapter, policy archaeology will enable me to probe how teacher autonomy and professionalism are articulated in the afore-mentioned South African education policies. Policy discourse will be analysed in terms of the operation of rules that bring it into being. As such, policy archaeology attempts to account for the way discourse is ordered. In view of this study, I am convinced that, during the application of policy archaeology, discourse in South African education policy will be “opened up” to gain innovative perspectives regarding teacher autonomy and professionalism. Thus, whilst the development of innovative perspectives on the discourses under study requires that we transform our ways of thinking, it also implies that we envision new knowledge production by exploring beneath surface appearances in South African education policies so as to reconstruct existing knowledge regarding teacher autonomy and professionalism.

CHAPTER 5: Empowering South African teachers regarding their professional autonomy

In this chapter I shall explore possibilities how innovative perspectives relating to teacher autonomy and professionalism may be utilised to empower South African teachers regarding their professional autonomy. The reason for such empowerment resonates with the notion that professional autonomy enhances rather than undermines teachers’ educational practices by situating them as the primary authors of their own success or failure (Hyslop-Margison & Sears, 2010: 2). I work with the assumptions that my endeavours in this chapter may contribute to the recognition of professional autonomy in teachers and the grounding of such autonomy in teachers’ professional practices. Furthermore, I argue that when South African

teachers are empowered regarding professional autonomy, teachers' voices may become a buffer against mere compliance and conformity.

Work in this chapter will require critical engagement with the innovative perspectives articulated in Chapter 4. I speculate that an empowerment towards professional autonomy may create space where teachers' voices can be heard, their experiences affirmed, their lives valued and their humanity asserted (*vide*: Ayers, 2004: 102).

CHAPTER 6: Reflection and Summary

This chapter will deal with more than just the usual section on "findings and recommendations" usually applied at the end of a research project. My endeavour is to reflect on how the application of regularities (Arena 2 of policy archaeology) to explore innovative perspectives regarding teacher autonomy and professionalism, may contribute to future research in education policy studies.

The application of policy archaeology, specifically arena 2, is in line with my research methodology. Postmodern deconstruction allows that new insights be utilised to direct thought towards the awareness of other aspects relevant to discourse under study without the intention of invalidating previous knowledge (Cobb, 1990: 157).

1.13 CHAPTER SUMMARY

In response to global challenges on education policy, perspectives regarding discourses such as teacher autonomy and professionalism have to be questioned and new understandings are to be constructed (Lamont & Molnár, 2002: 167-195). New and emerging teacher roles and relationships due to the challenges of globalisation on education policy necessitates a careful inspection of what we know about teacher autonomy and teachers' practice of teaching. Not only do education policies in a globalised context regulate teacher practices, but also requires a different understanding of their autonomy and professionalism. In this chapter I proposed that, from a view of postmodern deconstruction and by means of policy archaeology, an investigation should be conducted as to how **South African education policy in a globalised**

context contributes to innovative perspectives regarding teacher autonomy and professionalism.

To explore innovative perspectives regarding *teacher autonomy* and *professionalism* in South African education policy, I first intend to explore constitutive meanings of the mentioned two discourses by means of a conceptual analysis. Such an analysis is imperative, because information already in the existing academic literature will guide me to clarify prevailing meanings of the afore-mentioned discourses. Thus, Chapter 2 will focus on a conceptual analysis of the discourses of teacher autonomy and professionalism.

CHAPTER 2

DISCOURSES ON TEACHER AUTONOMY AND PROFESSIONALISM

2.1 INTRODUCTION

A central concept in this dissertation is “teacher autonomy” and it is only reasonable that the concept be explored in an effort to establish a clearer understanding of what it means. Not only is the concept used synonymously with “learner autonomy” and in relation to “professionalism”, but it has also been explored in the fields of anthropology, sociology and education sciences, amongst others. However, research has indicated that a definite explanation seems to escape what teacher autonomy may mean. For example, scholars and practitioners have connected teacher autonomy to student autonomy (Palfreyman & Smith, 2003; Sinclear, McGrath & Lamb, 2000); teacher education (Little, 1995; Reeve, 1998; Smith, 2003); professional development (Moñoz, 2007); agency in a globalised system (Vongalis-Macrow, 2007) and professional autonomy (Hyslop-Margison & Sears, 2010).

Yet, despite its widespread use, I observed that the meaning of teacher autonomy remains opaque. First, the lack of correlations amongst theorists within and across subject areas and research fields has resulted in a notable inconsistency in the use of the concept. Second, although teacher autonomy has been connected to a number of theories regarding professionalism, including professional development; professionalization and professional identity, such relationship still remains unclear (Wilches, 2007: 246). Articles and books about teacher autonomy and its relationship to professionalism seem to be more connected to theoretical analysis that test and enrich previous ideas, whilst scholars lament the absence of conceptual analysis, which does not allow for generalisations across studies and theories.

Conceptual differences regarding teacher autonomy and subsequently its relation to professionalism are also apparent in South African sources. As has been indicated in Chapter 1, I undertook various steps in an attempt to examine the extent to which research regarding teacher autonomy and professionalism has been undertaken within the South African education context (ERIC, Academic Search, Africa Wide, Humanities International Complete, Humanities International Index and MasterFILE Premier). I found no evidence which could indicate extensive research on teacher autonomy and professionalism in the prior

search libraries. With regard to education policy studies in South Africa and in line with a policy archaeology to explore innovative perspectives regarding teacher autonomy and professionalism, I consulted the works of different well-known South African scholars, amongst others (cf: Young, Waghid, Tikly, Salim and McGrath, Ntshoe, Gardiner and Skinner, Wits Education Policy Unit and Chisholm). However, no evidence could be found of similar research as I indicated in my prior view.

The absence of extensive research regarding teacher autonomy and professionalism in South Africa clearly shows why a study of this kind should be regarded a focal point in research. With regard to the latter and echoing Jacobs (2012: 52) when she quotes Higgens's (2007: 97) question regarding "institutional culture", I asked the same question with reference to "teacher autonomy and professionalism": *Why is it that the concepts of "teacher autonomy" and "professionalism" can come so readily to the lips, yet at the same time appear so difficult to pin down in a singular elucidation?* My answer from a postmodern point of view: The discourses of teacher autonomy and deconstruction are open to endless meaning. Therefore, my endeavour is to go beyond the boundaries of its meaning, disrupt present explanation thereof and explore innovative meanings of the afore-mentioned discourses in South African education policies in a globalised context.

In an attempt to expose innovative perspectives of teacher autonomy and professionalism, this chapter will unfold as follows: (i) An exploration of teacher autonomy by means of a conceptual analysis. A conceptual analysis has the potential of showing multiple uses of the concept "teacher autonomy" for the purposes of clarification. During the conceptual analysis, I shall place teachers in subject positions (*supra*: 2.2.1-2.2.5). Discourses in the academic literature provide a limited number of slots for people. These slots: *"are the subject positions that are available for people to occupy when they draw on discourse. Every discourse has within it a number of subject positions"* (Burr, 1995: 141 & Allan, 2008: 37).

Consequently, in this chapter my intention is to (i) negotiate subject positions for teachers by interacting with discourses in the academic literature and utilise them to enhance my own understanding of teacher autonomy; (ii) develop my understanding of the concept "teacher autonomy" in relation to professionalism; and (iii) deconstructively draw insights from the relationship between teacher autonomy and professionalism.

Having indicated how this chapter will unfold, the logical next step for me would be to commence with an analysis of the concept “teacher autonomy”.

2.2 ANALYSIS OF THE CONCEPT “TEACHER AUTONOMY”

A review of the academic literature on teacher autonomy reveals no consensus regarding an explanation of the concept. Therefore, I intend to draw information from as much academic literature as possible and align it deconstructively with my own teaching experience to enhance my understanding of the concept “teacher autonomy”.

Whilst studying towards becoming a teacher, I held the view that autonomy is an ability teachers possess to direct their own teaching practices whilst also enjoying the freedom to make choices independently. However, during my teaching career I soon experienced that the notion of teachers as free educational agents in the teaching profession seems to be illusionary. My experience seemed not to be far-fetched, because: “to act autonomously is a fiction” and “through the technologies of domination, education authorities have produces individuals who are governable” (Foucault, 1994b: 113). I recall that education authorities limited teachers by what they could do, how they worked and with whom they might exchange knowledge and information with, thus making teachers governable. Therefore, my argument that when teachers are treated as controlled subjects, their abilities to do their work independently are inevitably limited and as such, they are rendered professional practitioners with little or no autonomy. To confirm arguments from my teaching experience, I turn to Darling-Hammond (2001: 47-51) who posits that for teachers, a loss of autonomy not only implies a disrespect for their knowledge and expertise, but also robs them from being effective professionals.

Although I have significant experience of what “teacher autonomy” may entail, I decided to assemble more information from the academic literature to enhance my understanding of teacher autonomy. However, I am of opinion that, to develop a deeper understanding of teacher autonomy, a brief explanation of the concept “autonomy” is necessary. The concept of autonomy came into philosophical prominence for the first time with the work of Immanuel Kant, who was strongly influenced by the writings of Jean-Jacques Rosseau on moral freedom. Although Rosseau did not use the term “autonomy” in his writings, his views on moral freedom has a clear relation to Kant’s understanding of autonomy, articulated as:

“obedience to the law one has prescribed to oneself” (Affeldt, 1999: 299-233 and in Kerstein, 2008: 108). Kant’s view denotes the capacity of human beings to be independent, exercise freedom of the will, refuse to conform to and apply the ability to ignore convention. My point is that, not only do persons possess a capacity for choice that is motivationally independent, but they enjoy a law-giving capacity that is independent of determination from external influence and is guided by its own internal principle.

Since Kant, autonomy has been articulated as that property of human beings by virtue of which they possess inherent dignity and therefore intrinsically deserves to be treated with basic moral respect (Guyer, 2003: 70). I am of opinion that autonomous beings (also teachers) should not be passive players in life; they should be active agents – determining themselves by their own will, because one aim of the teaching profession, amongst others, is to foster autonomous agents. Cuypers & Haji (2008: 73) explain: “*autonomy as an aim of education may precede by way of the supposition that autonomy gives us freedom to choose our life styles*”.

In relation to the afore-mentioned aim of education, two colleagues and I conducted a study to explore pre-service teachers’ perceptions of autonomy in transformational learning (De Klerk, Palmer & Van Wyk, 2012). Responses gleaned from participants encapsulate that pre-service teachers view autonomy as an activity which includes thinking and acting responsibly; finding self-fulfilment and creating independent teaching practices; as well as embracing opportunities to develop optimally (De Klerk *et al.*, 2012: 21-22). Despite these views, respondents felt that they are not regarded as professional individuals who can use their autonomy to bring about changes in teaching practices at schools. Pre-service teachers admitted that they are aware of what autonomy entails, but they do not know how to apply teacher autonomy in their teaching practices. Some of the reasons cited are because they are limited in their efforts to implement their own teaching methods, and that they are confused about how to act autonomously; how they should work; and what learners should be taught. Emerging from our research (De Klerk *et al.*, 2012), my argument is that whilst the teaching profession ought to enhance teachers’ opportunities to be in control of their practices (thus fostering teacher autonomy) teachers’ options are simultaneously limited by the educational contexts they find themselves in. It is my contention that our research is a clear indication that the indicated aim of education cannot be regarded as an absolute truth, therefore my debate that “teacher autonomy” needs further conceptual clarity.

In my readings of the academic literature, many views regarding “teacher autonomy” have been articulated. Conceptual literature show a variety of explanations for this concept, ranging from a right to freedom from control (Benson, 2000); capacity in self-directed learning (Little, 1995); teachers’ autonomy as learners (Savage, 2000) to those that see the concept as the process of building a personal identity for teachers (Contreras, 1997). Whilst some authors communicate straightforward views regarding teacher autonomy, others examined the concept in a more comprehensive way. Having said the latter, I intend to explore some definitions of teacher autonomy to grasp what the concept denotes. I use the word “some”, because the more definitions of teacher autonomy I explored, the more they eventually portrayed the same meaning. For instance, Reich (2002) defines teacher autonomy as:

“A person’s ability to reflect independently and critically upon their basic commitments, desires and beliefs, be they chosen or unchosen, and to enjoy a range of meaningful life options from which to choose, upon which to act, and around which to orientate and pursue one’s life projects” (Reich, 2002: 46).

My understanding of Reich’s (2002) view is that autonomy is not a natural quality of humans (teachers), but something that is learnt. In this Reich (2002) has taken on the importance of an embedded conception of the self and the need not to presume a natural and already formed view of the human being. Interpreting Reich here, I assume that this explication implies that teacher autonomy must be planned for, educated for and therefore not be considered as something neutral.

Teacher autonomy should indeed not be considered as something neutral, but rather as a multi-dimensional term. In this regard Little (1995) asserts that teacher autonomy can be explained as:

“A strong sense of personal responsibility for their teaching, exercising via continuous reflection and analysis the highest possible degree of affective and cognitive control of the teaching process, and exploiting the freedom that this confers (Little, 1995: 179).

From Little's (1995) view, I observe that teacher autonomy enables teachers to make good sense of their profession in so far they are enabled to blend the rules of educational practices with that of professional ethics.

Referring to the above-indicated explications, my intention was to provide a brief understanding as to why teacher autonomy is to be considered a complex and multifaceted concept. Having said this, I think that teacher autonomy transcends a description of similar meanings. For instance, while scrutinizing the academic literature I came across an illumination of teacher autonomy by a group of language teachers during a 2001 conference in Shizuoka (Japan). I decided to utilize this definition in my analysis, because it contains underpinning concepts of teacher autonomy that is mentioned by other authors (Reich, 2002 and Little, 1997), amongst others. This perspective of teacher autonomy, which I shall base my analysis on, will enable me to later claim a position in terms of discussions regarding teacher autonomy. Consequently, the mentioned language teachers explained teacher autonomy in the following way:

“Characterised by recognition that teaching is always contextually situated, teacher autonomy is a continual process of inquiry into how teaching can best promote autonomous learning throughout life for learners. It involves understanding and making explicit the different constraints that a teacher may face, so that teachers can work collaboratively towards confronting constraints and transforming them into opportunities for change. Teacher autonomy is driven by a need for personal and professional improvement, so that an autonomous teacher may seek out opportunities over the course of his or her career to develop further (self-direction)” (Barfield, Aswell, Carroll, Collins, Cowie, Critchley, Head, Nix, Obermeier & Robertson, 2002: 220).

In my opinion, the above representation of teacher autonomy (ibid.) describes the exercise of autonomy, rather than autonomy itself. This means that the authors indicate what autonomous teachers are able to do, but it does not explain how teacher autonomy manifests when teachers take up certain positions of autonomy. To me the indication of: “how teacher autonomy manifests when teachers take up certain positions of autonomy” is important, because it may assist to enhance my understanding of the concept “teacher autonomy”. Thus,

to start I intend to analyse concepts from Barfield *et al.*'s (2002) explanation which I consider critically important to elucidate on "teacher autonomy". This is in line with my research methodology in the sense that dormant concepts in Barfield *et al.*'s (2002) explanation will be extracted and categorised (Table 1) to explore what these denote regarding teacher autonomy:

Table 1: Categorisation of extracts:

| | Extracted quotes | Categorisation |
|---|---|---|
| 1 | "...seek out opportunities...to develop further..." | <i>Self-direction</i> |
| 2 | "...promote autonomous learning throughout life..." | <i>Lifelong learning</i> |
| 3 | "...a continual process of inquiry..." | <i>Critical reflection</i> |
| 4 | "...confronting constraints and transforming them into opportunities for change..." | <i>Opportunities for transformation</i> |
| 5 | "...a need for personal improvement..." | <i>Teacher identity</i> |

An exposition of the categorisation of extracted quotes follows in the subsequent sections (2.2.1-2.2.5).

I am of the same opinion as Van Wyk (2009: 333) that an analysis of key concepts associated with discourse under study is crucial for research. Therefore, during the analysis of key concepts I shall be drawing from the academic literature, whilst also reflecting on my own teacher experience. Subsequently, the concepts of *self-direction*; *lifelong learning*; *critical reflection*; *opportunities for transformation* and *teacher identity* will be analysed. To reiterate, an analysis of the afore-mentioned concepts may develop my understanding of teacher autonomy.

2.2.1 Self-direction

In this section I shall draw from theories of different authors to deconstruct *self-direction*. My intention is to use their views to interpret subject positions teachers may be placed in. This is important, because the positioning of teachers within the concept “self-direction” may contribute to a further understanding of “teacher autonomy”.

Self-direction has strong roots that have been used for over 150 years. The concept was taken seriously in 1840 when a publication of *Craik's Pursuit of Knowledge under Difficulties* described human behaviour behind self-direction. Since this publication various explanations have been attached to the term. For instance, Stockdale & Brockett (2011: 162) regards self-direction as a process by which a person's self grows out of a person's commune with others. Here, part of the human development seemingly involves becoming able to take on the role of the other and visualise one's self from another person's point of view. In another study, Merisalo (2009: 9) observes that *self-direction* is achieved when the selves are internally voiced. This means that self-direction is obtained through diagnosing needs, identifying resources, choosing and implementing suitable strategies and evaluating outcomes. By obtaining the latter, the self may be regarded as an assertive individual. Apart from the prior theories I regard Gibbs' (1979) portrayal of self-direction most appropriate to be used in this dissertation, because self-direction usually denotes a state of freedom, independence and perhaps self-sufficiency.

Gibbs (1979) posits that a person is:

“An independent agent, one who is in command with himself, the author of his own work, deeds and way of life, not subject to the authority of other persons or things” (Gibbs, 1979: 119).

Interpreting Gibbs' view (1979), I deconstructively engage with the author in two ways. On the one hand, human life and personality are informed by social relations. In terms of self-direction, this refers to the relationships individuals have with others that serves as a means of the social identity of the self. Individuals would thus continually exercise authentic control over all decisions regarding themselves while in relationship with others. On the other hand, the nature of the self may be conceptualised in terms of its differentiation from others. Thus,

individuals are causal agents for these relationships in a sense that their existence is linked to various configurations that relates to *self-direction*. To me the latter implies that individuals gain access to and choose from a range of available resources as a means to act independently. Both my views are pedagogical and assist in positioning teachers with respect to self-direction.

Thus, deduced from Gibbs's view, I place teachers in two subject positions: *the teacher as a self-determined individual* and *the teacher is a competent and autodidactic individual* (Table 2):

Table 2: Categorisation of extracts into subject positions:

| | Extracted quotes | Subject position |
|----------|---|---|
| 1 | "...the author of his own work ..." | <i>The teacher as a self-determined individual</i> |
| 2 | "...not subjected to the authority of other persons or things ..." | <i>The teacher is a competent and autodidactic individual</i> |

In the first subject position, teachers may be considered as people who take control over their teaching practices. Here, I consider self-direction as a personal attribute which favours the idea of who is in charge of what is learned and probably who is in charge of what is taught in educational settings. This kind of control over own practices is the highest degree of control of the teaching process and a way of exploring the freedom that such control confers (Little, 1995: 179). The second subject position is that of a "competent and autodidactic individual" (Candy, 1987: 22-23). This implies that teachers act independent and free without the fear of any outside authority. In my opinion, such freedom is possible insofar teachers are in a position to diagnose, formulate, identify and make choices relevant to their teaching practices. The way autonomy manifests here is what Benson (2001: 5) refers to as a "*fully functioning person*". This reflects individuals' freedom and opportunities they may get as well as the kind of life they may lead.

Despite this favourable way to exercise self-direction as explicated above, my teaching reality has shown that teachers often are not keen to be in control of their own teaching practices. From my own experience as a principal of a school (2005-2009), my aim was to inspire teachers to employ their full potential by means of trusting their own judgements and

be in control of their teaching practices. My idea of teachers' ability to be self-directed is underscored by individuals' capacities of self-control, introspection and independence. Teachers would have been rendered as authentic selves, because they would be individuals in charge of their educational practises and in command of themselves. My attempts to foster autonomy align very much with the notion: "*the authors of their own work and not subjected to the authority of other persons or things*" (Gibbs, 1979: 119).

Here the authentic self and the notion of individual autonomy may be associated with each other. Individual autonomy is premised on the impression that: "*people are granted opportunities to exercise their abilities independently and critically upon basic commitments, desires and beliefs as well as to enjoy a range of meaningful life options from which to choose and to act*" (Reich, 2002: 46). In my opinion, this kind of autonomy allows a person to maintain and develop a personal identity, which is revealed by each of us on the path we follow in life.

In response to my attempts as a school principal to foster a school environment in which self-direction would become part of teachers' practices, I was fully aware that self-direction is dependent on the situation; context and social environment individuals find themselves in. It was thus understandable when teachers always responded in the following ways: "Do we have to do all the work now" or "Are we going to break old habits of conducting teaching at our school". This kind of attitude is what Bushnell (2003: 253) refers to as teachers being responsible for a perpetuation of their own subordinate status, restriction from making choices and a dampening of their intellectual freedom. In retrospect, I now believe that teachers may have feared extraction from their contingent and external relations with other people. If such fear is existent, teachers may become self-contained and solitary beings encapsulated in, and unambiguously marked off from the outside world (Fineman, 2004: 9).

My attempts to foster a sense of self-direction despite, and considering the attitudes of my colleagues, remind me of South African education before 1994. Under apartheid, South African teachers were treated as state functionaries with little autonomy and the sole requirement for teachers was bureaucratic and political compliance with state education (Department of Education, 2000b: Section 1.1 and Jansen, 2001: 243). Teaching load, lack of time, excessive paperwork, imposed educational policies and a lack of collegial and administrative support nudged teachers to be compliant teaching practitioners. I am now

convinced that the question posed by teachers “Are we going to break old habits of conducting teaching at our school?” can be aligned with the latter views. It seems that South African teachers are obedient implementers of curriculum which is very prescriptive, content-heavy, detailed and authoritarian with little space for teacher initiative and subsequently no space for *self-direction* (Jansen, 2001: 243).

If teachers’ ability for self-direction is depleted as indicated in the prior outlay, I argue that individuals’ autonomy dwindles. My point is that with the diminishing of teachers’ freedom, any claim by them to be autonomous, is denied. This, according to Darwall (2006: 268) is: “*primarily a failure of respect, a failure to recognise the authority of persons to make their own choices*”. A failure of respect and recognition imply a loss of individuals’ dignity which inevitably may hold implications for lifelong learning.

2.2.2 Lifelong Learning

Dickinson (1995: 171) asserts that when people accept responsibility for enhance their own learning, personal efforts for is within the control of the learner. To “accept responsibility” and to be in “control” give substance to lifelong learning as a concept that can enhance an understanding of teacher autonomy. Therefore, in this section I explore debates concerning lifelong learning. My starting point would be to get an overview of what lifelong learning may entail; to interpret subject positions teachers may occupy in relation to lifelong learning. Significantly, the positioning of teachers within the concept “lifelong learning” may enhance my understanding of “teacher autonomy”. I shall also draw on my own teaching experience and on South African education policy perspectives to contribute to an understanding of lifelong learning in terms of teacher autonomy.

For me, life’s rapidly changing challenges and demands necessitates enduring developing of one’s own learning. My point is that, because information so easily becomes obsolete, continuous reinforcement of skills and knowledge for one’s own sake and throughout one’s working life is of critical importance. The latter should happen if our skills are to remain relevant and we are to stay employable in a global world. Therefore, a growing interest of lifelong learning still exists. Since the *Organisation for Economic Cooperation and Development* (OECD) committed to lifelong learning in 1996, there has been a growing

interest in the concept in education policy context. Because of such growing interest, the *European Lifelong Learning Initiative* articulated lifelong learning as:

“A continuously supportive process which stimulates and empowers individuals to acquire all the knowledge, values, skills and understanding they will require throughout their lifetimes and to apply them with confidence, creativity and enjoyment in all roles, circumstances, and environments” (Watson, 2003: 3).

To elucidate Watson’s view (2003), I consider it reasonable to argue that teacher autonomy in terms of lifelong learning is underscored by three implications for teachers: it may bring personal fulfilment, foster active citizenship and promote employability. To test the relevance of my argument, I turn to Watson (2003: 3) who makes four points regarding lifelong learning: lifelong learning relates to *individuals who are* (promote creativity and personal fulfilment); the notion of *live together* (exercise tolerance, understanding and respect); *individuals who do* (acquire and apply skills); and *individuals who know* (have an approach to learning that is flexible, critical and capable) (ibid.). It is my argument that the latter may result in teachers experiencing a transformation of understanding; control over their own lives and educational practices; and the ability to exercise freedom of choice. Based on my argument and in view of Watson’s explanation of lifelong learning, I place teachers in one subject position (Table 3):

Table 3: Categorisation of extract into subject position:

| | Extracted quote | Subject position |
|----------|---|--|
| 1 | “A continuously supportive process which stimulates and empowers individuals...” | <i>The teacher in a position of empowerment</i> |

To empower teachers in education remains a fundamental imperative. Of significance is the realisation that teachers take responsibility for their own learning, while having the confidence, willingness and motivation to learn (Watson, 2003: 6, Bogler & Somech, 2004: 278 and Lintner, 2008: 76). The authors’ views take me on a trip down memory lane. Albeit my colleagues’ negativity regarding “breaking the traditional way of doing things” (*infra*:

2.2.1), I succeeded in reminding them about their skills and knowledge which might be utilised to improve the situation (school environment) in which they operated. In doing so, I created opportunities where they could partake in decision making, developed and implemented programmes for professional growth and assisted them to improve self-efficacy. This was achieved by involving them in budget proposals, teacher selection, curriculum development and expanding their skills during their work at school. The outcome of my empowerment strategies not only improved teachers' self-esteem, but left them with feelings of being in control over various aspects of their working life.

When efforts are made to empower teachers, as I did during my five years as principal of a school, they become less bound by their immediate situation and are more able to weigh possible outcomes which may be of benefit to them. My efforts to engage teachers in lifelong learning by means of empowerment, resonates with a South African policy vision articulated in 1994. The vision was first set out in *The Policy Framework for Education and Training* (1994) by the Education Department of the *African National Congress* in 1994: “All individuals should have access to lifelong education and training irrespective of race, class, gender, creed or age” (African National Congress, 1994: 3). The idea would be to empower teachers regarding professionalism, the technology of teaching and learning and how to be effective teachers. However, new discourses in terms of “integration of education and training”; “a single qualifications framework”; and “outcomes-based education” have made the overall vision for lifelong learning in the interest of South African education, difficult (Walters, 2006: 10).

Although the empowerment strategies I implemented at school initially resonated with the afore-mentioned vision (African National Congress, 1994) regarding lifelong learning, the implementation of the latter as it is currently practised in South African education may be considered as negative. Crowther (2004: 125) asserts that a negative implementation of lifelong learning contributes to an undermining of teachers' educational activities and introduces mechanisms of surveillance.

Crowther's view (2004) reminds me of what happened in the context of education in South African prior to 1994. Teachers were afforded little or no opportunities to engage in lifelong learning activities. For instance, the leadership styles of principals were rigid and domineering, with close and constant control over teachers' work (Calitz & Shube, 1992: 37

and Williams, 2011: 190). This situation militated against South African teachers' development. Unsurprisingly to me, teachers were generally not empowered for the role of educational leadership. What is evident is the way power was exercised over South African teachers. The exercise of power puts forward a form of governance that could be seen in the daily practices of disciplinary technologies resulting in teachers becoming docile bodies. In this context, disciplinary technologies refers to ways in which time and space are organised to act upon South African teachers in such a way that human behaviour becomes standardised and controlled (Lawson, 2007: 6). Because this happens, I am of opinion that lifelong learning in terms of teacher autonomy is not democratically or educationally productive, but rather a vehicle used by management for increasing control over teachers.

What emerges from this section is that lifelong learning offers teachers opportunities to update their existing educational knowledge and enjoy activities which they may either lay aside or always wanted to do, but were previously unable to (Chapman & Aspin, 1997: 49). Therefore, teachers should pursue activities that they had previously imagined were outside their available time or competence and work consciously at extending their intellectual horizons by seeking to understand and grasp educational advances of recent times. I argue that, in the event of "looking back" in order to "extend future opportunities", lifelong learning has an adjacent connection with teachers' capacity for critical reflection.

2.2.3 Capacity for critical reflection

This section provides a deconstruction of the concept "critical reflection" and what it means in terms of teacher autonomy. First, I discuss views drawn from the academic literature, whilst also referring to examples from my experience as a teacher and school principal. Secondly, I shall place teachers in one subject position as a means to develop an understanding of "teacher autonomy".

The concept "critical reflection" carries multiple meanings. For some it refers to adopting a thinking approach to practice, while others interpret it as a reflective exercise about one's experience in practice (Finlay, 2008: 2 and Morley, 2011: 2-3). The preceding holds an interpretation of critical reflection as a process of making a revised explanation of the meaning of an individual's experience. Consequently, two authors write about critical reflection as a way to:

“put aside the natural attitude of their everyday life-world and adopt a sceptical approach towards taken-for-granted innovations necessary for progress, supposedly acceptable impositions as the price of progress, and seemingly authoritative sources of information describe for us the landscape of contemporary social reality” (Collins, 1991: 94 & Clement, 2007: 9).

In education, if teachers exercise such ability as indicated above, I argue that they may be in a position to question authority and develop their own voice as a way of making meaning of themselves and taking up opportunities to change their educational practices. In the light of the afore-going, I place teachers in the following subject position:

Table 4: Categorisation of extract into subject position:

| | Extracted quote | Subject position |
|----------|---|---|
| 1 | “...adopt a sceptical approach towards taken-for-granted innovations...” | <i>The teacher in a position of liberation from structures of dominance</i> |

Taking up a position of liberation constitutes one of the main interest of human beings, namely to free themselves from domination. Loughran (1996: 21) writes about a position of liberation as: *“the purposeful, deliberate act of inquiry into one’s thoughts and actions through which a perceived problem is examined in order that a thoughtful, reasoned response might be tested out”*. In terms of my own teaching experience, Loughran’s (1996) views are particularly relevant. Teachers engaged in intellectual and affective activities in which they critically analysed their past experiences to come to new understandings of their teaching practices. Consequently, for some teachers, the idea of ways of knowing and interaction in terms of educational developments challenged their own ideas about the role of teaching. The afore-mentioned teachers’ experiences at our school relate very closely to a view of Reich (2002) regarding critical reflection as:

“A person’s ability to reflect independently and critically upon the basic commitments, desires and beliefs, be they chosen or unchosen and to enjoy a range of meaningful life options from which to choose, upon which to act,

and around which to orientate and pursue one's life projects" (Reich, 2002: 46).

Reich's explication (2002) places expectations on teachers' capacity not only to think critically, but to move towards critical beings who subsequently takes action in exercising autonomy in their educational practices and experiences. However, autonomy is not a neutral quality of humans, but something to be learnt. In this Reich (2002) has taken on board many of the communitarian criticism of *liberation*, regarding the importance of: "*an embedded conception of the self and the need not to presume a natural already formed view of the human being*" (Reich, 2002: 46). Arguably, autonomy should then be planned and educated for, because it is not neutral. The point I am trying to make is that through critical reflection, teachers may, amongst others, develop a capacity to review their own work, validate their educational development and foster decision making skills. Therefore, teachers should see critical reflection as the process by which they question and then replace or reframe educational assumptions that have been uncritically accepted as a representation of common-sense wisdom (Barnett, 1994: 1; Brookfield, 1995: 2 and Pressick-Kilborn & Te Riele, 2008: 61-62).

Conversely, South African teachers do not always have a voice of their own, nor are they afforded opportunities to reflect on and improve their teaching practices. They: "*faced situations which will not go away, by issues that cannot be disregarded, by choices that have to be made*" (Hartshorne, 1999: 65). If Hartshorne's (1999) view is to be considered as true, I suspect that teachers are confined to how educational authorities want them to think, act and do. Thus, teachers are seemingly denied opportunities for new knowledge production, imagining new ways of approaching old problems and exploring beneath surface appearances to a future that could not be imagined (Waghid, 2002: 459 and Delany & Watkin, 2009: 413).

This section places emphasis on teacher autonomy in terms of critical reflection as "reflection plus action" (Harrison, Lawson & Wartley, 2005: 423). It therefore seems obvious that if teacher autonomy is to be understood in terms of critical reflection, teachers' experiences (actions) should be followed by reflection (looking back) and learning (review) while they simultaneously take actions for development and create future opportunities for transformation.

2.2.4 Opportunities for transformation

Whilst the notion of transformation often carries positive overtones of change being “for the better”, this implication is open to critical examination. Consequently, in this section I shall explore the concept “transformation” and draw on theories from the academic literature to enhance an understanding of what it may mean. During this exploration, I shall also share experiences from my own teaching experience, after which teachers will be placed in one subject position as a means to develop an understanding of “teacher autonomy” in terms of transformation.

Since ancient times, transformation was an evolutionary process within the consciousness of how a person views the world in a new way (Wade, 1998: 714). The consciousness allows the mind to access information processed by the brain at an unconscious level. Regardless of the level of consciousness, transformation becomes a state of being of engendering full awareness-awakening and unfolding of the neglected potential of human consciousness. Interpreting Wade’s views (1998), I hold the perception that transformation seems to be a form of enacted change that is planned with an intention to bring about significant changes in how individuals manage themselves. Comparing my perception with the academic literature, an emphasis on “enacted” provides a foundation for self-discovery. When this happens, individuals’ feelings, images and thought about themselves and the world around them are unified in their actions (Norris, 2001: 220). Subsequently, when individuals take action to bring about change, they release old ways of knowing; is receptive to new ways of viewing the self and experiences are interpreted in a new context (Norris, 2001: 220 and Mbabane, 2010: 4).

I contend that to change old ways and pursue new ways of thinking and doing is not always an easy task. With twenty years of teaching experience, I am reasonably familiar of what the afore-mentioned authors are trying to communicate here. For South African teachers (before 1994) opportunities to contribute to transformation and ultimately to develop a consciousness regarding self-direction, were not possible at all. With regard to education policy, the education system and subsequently teachers were: “*traumatised by years of apartheid rule, where relationships between communities and schools, parents and teachers... have been polarized*” (Moyo, 2005: 8). At first glance, it appears as if Moyo (2005) tries to give a sketch of how South African teachers were considered servants of government and have had

no authority with regard to almost any changes in education. I argue that Moyo's (2005) view may be acceptable, because the system of teacher education before 1994 was driven by the political agenda of apartheid which led to a lack of overall coherence as far as teachers, their roles and the education system is concerned (Department of Education, 1995). It is thus not far-fetched to argue that teachers in this country could not act as free educational agents and their autonomy became bridled and excessively controlled. Thus, for teachers, thinking and acting as agents of transformation were indeed a different task.

However, transformation, as expressed in *Education White Paper 3*, introduced the objective to break with the apartheid past. For Waghid (2002: 459) such transformation encapsulates a process of new knowledge production and reflexive action. Transformation in this sense seemingly requires teachers to undergo a paradigm shift and adopt a different view of their educational realities. My view is justified by Wade (1998) when he posits that:

“Transformation is a dynamic, uniquely individualised process of expanding consciousness whereby an individual becomes critically aware of old and new self-views and chooses to integrate these views into a new self-definition” (Wade, 1998: 716).

What comes to mind is that Wade's view (1998) alludes the bringing about of a new understanding of how teachers may be positioned in educational setting. Therefore, I place teachers in the following subject position (Table 5):

Table 5: Categorisation of extract into subject position:

| | Extracted quote | Subject position |
|----------|---|--|
| 1 | “...an individual becomes critically aware of old and new self-views...” | <i>The teacher in a position of consciousness towards a new self-definition</i> |

Fisher (2006: 295) explains that a consciousness towards a self-definition foregrounds the possibilities of a different future which may include teachers' roles in schools, professional development and knowledge production, amongst others. If teachers are to contribute to the possibilities of transformation, I argue that they have to abandon old ways of doing and

knowing and adopt a new, broader definition of the self. As such, if teachers seize opportunities for transformation, they tend to act as critical thinking beings and enjoy more freedom from constraints. Here, teachers become conscious that old ways of acting and thinking are no longer effective. Such consciousness may contribute to teachers becoming autonomous. If teachers become autonomous, they are able to make independent decisions, determine their own learning and to take a transformational stance towards their educational practices (Vieira & Marques, 2001/2: 11).

Considering the previous views, I want to suggest a few views *vis-à-vis* teacher autonomy in terms of *opportunity for transformation*. Autonomy requires a focus on the importance of supportive social conditions necessary for fostering autonomous action. Autonomy is socially constructed, that is, the capacity and opportunity for autonomous action is dependent upon our particular social relationships and the power structures in which we are embedded (McDonald, 2002: 194). My argument is that autonomy requires that teachers' relationships with other individuals be constituted in such a way so as to give genuine opportunities for self-definition and transformation. If one values transformation as a consciousness for self-direction, teacher autonomy becomes relational.

Therefore, although autonomy can be associated with independence and freedom of choice, relational autonomy alerts us that people are never fully independent, but that they can find ways to facilitate meaningful self-definition within an overall context of interdependency. On the other hand, I also contend that, if teachers work in educational contexts (like the previous South African education system) where agonistic ideas, negative policy influence and conflicting interest impede transformation, teacher autonomy diminishes. However, if transformation can contribute to teacher autonomy, education should provide space for personal reconstruction, empowerment and emancipation. In such a space, teachers should be afforded opportunities to exercise their ability to self-regulate and take a critical stance towards developing teacher identity.

2.2.5 Teacher identity

In postmodern approaches, teacher identity is no longer seen as an overarching and unified framework but, instead, as being fragmented along with the multiple social environments individuals engage in (Akkerman & Meijer, 2011: 309). Taking the mentioned authors'

views as a basis, my endeavour in this section is to consult existing theories to explore what teacher identity may entail. A further step would be to align views from the academic literature with my own teaching experience to subsequently place teachers in a subject position. The aim is to enhance my understanding of the concept “teacher autonomy” in terms of teacher identity.

Conceptualisations of teacher identity seems to reflect postmodern views on identity, ranging from “sub-identities” (referring to multiplicity), as being “an enduring process of construction” (referring to discontinuity) and as “relating to various social contexts” (referring to the social nature of identity) (Akkerman & Meijer, 2011: 310). Like the authors, I believe that these characterisations are remarkably interesting and valuable, because they bring out a different view towards teacher identity.

Although teacher identity was considered as the possession of a defined set of assets required for a profession, I shall provide a brief explication of what multiplicity; discontinuity and the social nature of identity refer to. Multiplicity relates to the different contexts and relationships teachers find themselves in (Sutherland, Howard & Markauskaite, 2010: 455). Discontinuity explains the shifting and unstable nature of identity (Rodgers & Scott, 2008: 732) while the social nature of identity encapsulates a strong interaction between personal histories and the contextual influences of the workplace in determining teachers’ identities (Flores & Day, 2006: 219). My understanding of the preceding is that identities develop through time and teachers position themselves different in various situations and differently towards other persons. If teachers recognise this contingency, they would move beyond dogmatic conceptions of identity that delimit their potential responses to their social positioning. As such, teacher identity:

“Provides a framework for teachers to construct of how to be, how to act and how to understand their work and place in the society” (Sachs, 2005: 15).

Teacher identity seems to be under constant reconstruction and for this reason I place teachers in one subject position (Table 6):

Table 6: Categorisation of extract into subject position:

| | Extracted quote | Subject position |
|---|--|--|
| 1 | <i>“...a framework for teachers to construct of how to be, how to act and how to understand their work...”</i> | <i>The teacher in a position of becoming</i> |

Zembylas (2003: 215) postulates that an understanding of teacher identity is: “*a manner of moving away from traditional questions of who is, to new questions of when, where and how one is*”. Such an understanding is premised on the notion of *teachers’ becoming*. Becoming suggests the incompleteness of identity and a dynamic identity construction that involves an unstable process by which individuals confirm or problematise who they become (ibid.). From my teaching experience the prior view would be contemplative of the unpredictability of teachers’ identity in the process of coming to know who they are and their vulnerable with respect to the influences of others and the school environment on their identity formation. In other words, teachers’ relations with other people, choices, practices and languages, amongst others, constantly construct and reconstruct their identities.

While it is evident from the previous discussion that identity is an acknowledged part of teachers’ becoming: “*the identities teachers develop, shape their dispositions, where they place their effort, whether and how they seek out professional development opportunities, and what obligations they see as intrinsic to their role*” (Hammerness, Darling-Hammond & Bransford, 2005: 383-384). The prior notion signifies, in my opinion, that while identity is constantly under construction, teachers are enabled to learn more about the self. My view seems to be in line with teachers’ negotiations of what teaching is or should be; how they relate to the identity of others in education and how they become agents of their own identity development (Britzman, 2003: 221).

Teacher autonomy in terms of teacher identity is often presented as a struggle, because teachers have to make sense of varying and sometimes competing perspectives, expectations and roles they have to confront and adapt to (Beijaard, Meijer & Verloop, 2004: 115). Autonomy becomes a struggle, because teacher identity becomes negotiated, open, shifting and the result of culturally available meanings. For teachers this is a challenge given that governments do not see it to be in their interest to accommodate autonomous teachers (Sachs,

2001: 155). This reminds me of how South African teachers were treated before 1994. A teacher in the South African education context: “*was an obedient servant that executed the well-defined instructional tasks per an official syllabus and a moderated examination*” (Jansen, 2001: 243). The latter provided no space for teachers to act as free agents and as such teachers develop identities through socialisation in a racialised environment.

Understanding teacher autonomy in terms of teacher identity, I reason that teacher identity is negotiable, flexible and adaptive. This line of thinking raises the notion that autonomous teachers become the knowers of themselves within their practices of teaching and learning.

The subject positions of teachers (*infra*: 2.2.1-2.2.5) were made possible by the way language, in the academic literature coupled with my own teaching experience, has been created and used. The relevance of subject positions, as part of the conceptual analysis conducted in this study, may be understood in terms of how discourse leaves meanings related to teacher autonomy incomplete and unfinished (Maglaras, 2013: 4). The conceptual analysis conducted indeed contributes to a development of “teacher autonomy”. However, I contend that conceptual analysis of the concept “teacher autonomy” conducted so far may be considered infinite in the sense that there are always more lines of inquiry to pursue. In the words of Du Toit (2005):

“In spite of this infinity and unavoidable open-endedness and despite of its limitations and tentative nature, every conceptual analysis must produce a clear outcome, result or conclusion. Thus, findings of a conceptual analysis usually consist of a summary of the key elements or core components of the concept under focus. These sometimes culminate into a stipulative or a working definition for the key concept” (Du Toit, 2005: 436).

If Du Toit (2005) is correct, then my task is to share meanings I deduced from the conceptual analysis of teacher autonomy. Such meanings related to teacher autonomy will be discussed in the next section.

2.2.6 My contribution to meanings of *teacher autonomy*

The conceptual analysis conducted revealed the multiplicity of the concept *teacher autonomy*. It seems that, the more I consulted academic literature, the more there is to be exposed about *teacher autonomy*. Having said this, I do not claim to have assembled all the meanings related to the concept “teacher autonomy”. However, I intend to share those meanings deduced from the conceptual analysis. From the knowledge gained (*infra*: 2.2.1-2.2.5), I offer the following meanings that can be attributed to teacher autonomy: *listening to the internal voice, confronting the self* and *moving beyond static pictures of teacher identity*. An elucidation of these meanings follows (2.2.6.1-2.2.6.3).

2.2.6.1 Listening to the internal voice

In this sub-section I want to explicate the notion of “listening to the internal voice” as a way to showcase my contribution to the meaning of teacher autonomy.

When teachers are able to be in command of themselves and considered the authors of their own work, they increasingly portray indifference to the opinions of others (*infra*: 2.2.1). In doing so, teachers may become the architects of freedom and independence which may contribute to the construction of teacher autonomy. I argue that if teachers would attempt to act as free beings, they would listen to themselves and rely on their own judgements. My argument is relevant, because research findings indicate that when teachers are able to listen to themselves and act from within, they are listening to an internal voice (Heller, 2003: 1029). An ability to listen to an internal voice and act accordingly implies that teachers would have the power to exert control over their own teaching practices and experience a sense of mastery. Thus, if teachers listen to an internal voice, they move from a position of being objects to that of subjects. For me this implies that teachers will be able to observe themselves, analyse themselves and interpret their educational roles in an autonomous fashion. Arguably, such obedience to oneself (not merely to others) may contribute to a high degree of autonomy in teaching processes and a way of exploring the freedom that such autonomy confers.

2.2.6.2 Confronting the self

This sub-section aims at drawing attention to “confronting the self” as my contribution to the meaning of teacher autonomy. Unlike Burkitt (2002: 219) who was not interested in developing a Foucauldian argument for analysing the self, I associate myself with Foucault’s notion (1988) of technologies of the self for the following reasons: (i) the self has personal competencies and abilities that provide for choice and autonomy to demonstrate those competencies (*infra*: 2.22); and (ii) technologies of the self gives permission to individuals to act on their own thoughts and conduct with the intention to transform themselves so as to attain a state of autonomy (Foucault, 1988a: 18). For the afore-mentioned technologies to take effect, a confrontation of the self becomes invaluable (*ibid.*). I argue that such confrontation resonates with teachers’ capacity to search for multiple truths of who they are, what they are able to do and with whom they may exchange information with. If teachers confront themselves like in the prior view, autonomy becomes possible through observation, reflection, thoughtful consideration, experience and self-evaluation. Consequently, such confrontation may contribute to new understandings of how individuals may be in a position to refine or reconstitute an identity of the self.

2.2.6.3 Moving beyond the static pictures of identity

This sub-section alludes to “moving beyond the static pictures of identity” as my way of contributing to the meaning of teacher autonomy.

If identity is considered to be an on-going construction of the self, relating to various contexts and relationships (*infra*: 2.2.3 & 2.2.5), how can it be that individuals (like teachers) are recognised as “unique humans” or “one and the same person as yesterday”? In answering these questions, I put forward the argument that identity emphasises the impossibility of a fixed self, but one that is dynamic and continuously reconstructed. By constantly referring to their past, making future projections and negotiating in the present, teachers’ identities are articulated in the temporal dimension of human existence (Mallett & Wapshott, 2011: 273). Considering Mallett *et al.*, view (2011) I argue that, by standing back, anticipating the future and living in the present, teachers develop capacities to discover, create and affirm their own identities with an opportunity to liberate themselves from fixed social positions. The possibility therefore exists that teachers are able to independently act to developing and

transforming their identities so as to attain an autonomous mode of being. In doing so, teachers not only adhere to “moving beyond static pictures of identity”, but simultaneously play an important role in being autonomous regarding the constant reconstruction of their identities.

Such an understanding of autonomy takes into account human feelings, rationality, responsible action and values, and, when put together, they reflect a given attitude towards life. It echoes a few of Freire’s ideas (1996) regarding autonomous individuals. First, they (teachers) should be aware of their activities and the world (teaching environment) in which they are situated. Second, teachers should act in function of the objectives relating to their teaching practices. Third, teachers should have the seat of their decisions located in themselves and in their relations with others (Freire, 1996: 79). If teachers are thus afforded the capacity, freedom and responsibility to make choices concerning their own teaching, I contend that they can then be considered autonomous.

From the conceptual analysis of *teacher autonomy* I envisage that teachers should be aware of the reason, time, place and the way they can utilise their pedagogical skills and update their knowledge as part of their teaching practice. This signifies autonomous teachers as individuals with a capacity for self-directed teaching and professional development, because there is a focus on growth as human beings and permanent learners (*vide*: Ramos, 2006: 189). A desire for personal development may be considered a significant requirement of the educational society and one of the main resources of professional satisfaction. Such requirements should take us a step forward as a means to find out more about professionalism (Ramos, 2006: 104), since teacher autonomy is considered to be an important feature of professionalism. The preceding provides a useful basis to engage in a discussion regarding the relationship between these two discourses.

2.3 TEACHER AUTONOMY AND PROFESSIONALISM

In this section I explore the concept *professionalism* and its relationship to *teacher autonomy*. As a former teacher, I am of opinion that *professionalism* is at the heart of what it means to be a teacher and is thus central to teaching. Therefore, I argue that to be a professional teacher, one must embrace the concept *professionalism*.

After I scrutinised a considerable volume of academic literature, much of the debate about professionalism indicated that it is a socially constructed, contextually variable and contested concept (Freidson, 1994: 169; Quicke, 2000: 299; and Beaton, 2010: 1). Thus, considering the changing nature of occupations and the limitations of previous analysis of professionalism, a conceptualisation of the mentioned discourse for this dissertation is necessary to account for a plurality of meaning articulations and suppositions. I begin this section by placing meanings related to professionalism under the microscope with an eye toward exploring the relationship between “teacher autonomy” and “professionalism”.

2.3.1 Professionalism under the microscope

Kolsaker (2008: 515-516) declares that professionalism is a challenging concept to research, because the field is relatively under-researched. Previous academic literature reveals that a compendium of scholars articulated professionalism as a form of occupational control; a normative values system; the basis of the relationship between professionals and their publics and as a basis of social and professionals’ status (Troman, 1996: 473; Evetts, 2003: 395; Nixon, 2003: 3 and Noordegraf, 2007: 761, Hewitt, 2012: 83). Indeed, the lack of consensus over what professionalism means provide reasons why a further exploration of the concept can be deemed significant.

By placing professionalism under a microscopic eye, I associate myself with Foucault’s consideration of the concept as a: “mode of being” in a work context (Kolsaker 2008: 517). Concomitantly, professionalism is articulated as:

“Professionalism-influenced practice that is consistent with commonly-held consensual delineations of a specific profession that both contributes to and reflects perceptions of the profession’s purpose and status and the specific nature, range and levels of service provided by, and expertise prevalent within, the profession, as well as the general ethical code underpinning this practice” (Evans, 2010: 5 and Hoyle & Wallace, 2007: 19).

For me, the above explication of professionalism carries a variety of meanings which relates to and conveys: what individuals can do (in the context of their working lives); how they do it; what they know and understand; what attitudes they hold and what their functions are. My

interpretation seems to resonate with concepts such as *profession*, *professional* and *professionalization*. For instance: professionalism relates to *being professional*, that is the quality of what teachers do, their conduct, manner, demeanour and the principles and values that guide their behaviour (Evetts, 2009: 19-30). On the other hand, the professionalization process relates to *being a professional* and is associated with how teachers are viewed by others, their status, standing and levels of reward (Evetts, 2009: 19-30). Thus, the perception of teachers as members of a profession and their quest for professional recognition is allied to professionalization. This, according to Frowe (2005: 42) is a form of legal legitimacy which is an indication of the degree of trust within the teaching profession.

Considering the above, two inferences can be made regarding *professionalism*. On the one hand, *professionalism* has been increasingly used by policy-makers to mean, as Darling-Hammond (1990: 31) puts it: “*an unquestioning compliance with agency directives*”. Speaking from my own twenty years’ teaching experience, the prior view may be related to educational contexts. Teachers’ inputs and contributions to education have been hijacked by the government to indicate the degree to which they subject themselves to agendas associated with the drive to raise educational standards. Such a conception of policy-making may lead to a view that: “*the professional teacher in common parlance is one who does things right rather than one who does the right thing*” (Darling-Hammond, 1990: 31). It is based upon discourses of accountability as well as measurements of performance in an attempt to raise quality in education. The implication is that teachers are constantly under surveillance in the education environment (Quicke, 2000: 299). On the other hand, an alternative policy conception views *professionalism* as empowerment. This conception seeks to enhance the status of teachers and to encourage them to contribute actively to the promotion of educational reform and societal change (Webb, Vulliamy, Hämäläinen, Sarja, Kimonen & Nevalainen, 2004: 87).

In retrospect, it is evident to me that the concept *professionalism* shows a relationship with *teacher autonomy* in the sense that professionalism is fundamental to the constant contestation between control and autonomy. For example: professionalism, which is underpinned by efficiency and effectiveness, amongst others, causes that teachers cannot realistically be expected to exercise professional discretion, because they are frequently bound by restrictive frameworks of bureaucratic rules and managerial controls (Warrior, 2002: 61). Already here, I depict “efficiency and effectiveness”, “restrictive frameworks”,

“bureaucratic rules” and “managerial controls” as having implications for teacher autonomy. This, from a Foucauldian view, implies a detailed control of teachers’ professional teaching practices as well as an indication of who they are supposed to be (Foucault, 1977: 135).

2.3.2 Relationship between teacher autonomy and professionalism

While autonomy is generally accepted as a feature of good practice, the notion of teacher autonomy and its relationship with professionalism is frowned upon. One of the reasons for such frowning may be because teachers are part of the educational society to which they belong and the social nature of people drastically challenges constructions of autonomy (Jiménez Raya, 2007: 32). I take this to mean that, in the education profession, teachers as professionals would simultaneously act as autonomous beings, whilst their autonomy may also be challenged by educational demands relevant to their teaching practices. Like MacDonald (2002: 196) emphasises: “*A professional is (roughly) a member of a self-regulating occupational group granted the exclusive right to practice in a particular field*”. It is for this reason that I deem it necessary to probe the relationship between teacher autonomy and professionalism in this dissertation.

Theories of teacher autonomy propose that autonomy is a relation concept. In such a view, teachers’ autonomy is socially constructed, that is, the capacity and opportunity for autonomous action is dependent upon their particular social relationships and the power structures they are embedded (Sherwin, 1998: 19 and Stoljar, 2011: 2). Thus, although autonomy is associated with independence, I am of opinion that a relational understanding of autonomy sees teachers as never fully independent. If related to my own teaching experience, I made efforts to facilitate meaningful self-direction (autonomy), although such efforts were implemented in an overall context of interdependency. My point is that we could not find a single way at school for teachers to function entirely as autonomous professionals. This was because teachers were subjected to education policy, curriculum demands, departmental responsibilities and learner expectations, amongst others. In view of my teaching experience as well as observation from the academic literature, two inferences can be made. First, teachers are controlled (by education policy) and they adhere to educational standards (curriculum demand). Secondly, although teachers’ freedom is restricted, they are afforded opportunities to function professionally and effectively in their own teaching environments.

From the discussion above, evidence of the relationship between teacher autonomy and professionalism emerges. In the everyday realities of teachers' lives, educational demands hold implications for teacher autonomy. The teaching profession contributes to informing teachers what kind of professionals they ought to be. The contexts in which teachers find themselves inform their sense of identity, their goals and relationships with colleagues as well as choices they have to make (Hunt & Ellis, 2010: 4). To me it seems as if professionalism contours how teachers are located within the profession, how they should act as professionals and how they should develop within their particular educational contexts. In terms of the indicated relationship and derived from the discussion thus far, I intend to further probe the relationship between teacher autonomy and professionalism. In an attempt to deepen my search on the relationship between the two concepts under scrutiny, the following sub-sections emerged and will be probed: (i) Teacher autonomy in the teacher profession; (ii) Teacher autonomy in relation to a professional culture; and (iii) Teacher autonomy professionalization. After discussing each sub-section, I shall identify suppositions that would enhance an understanding of the relationship between teacher autonomy and professionalism.

I shall start the indicated discussions with an explication of *teacher autonomy in the teaching profession*.

2.3.2.1 Teacher autonomy in the teaching profession

By virtue of their educational breadth and their importance in satisfying fundamental human need, occupations such as medicine, law, ministry, military and some academic careers have enjoyed the status as professions. These occupations: "*meet the criteria for a sociologically defined profession in the sense that they position them less with respect to their expertise, than in their dedication to something other than self-interest while providing services*" (Pellegrino, 2002: 378). If the afore-mentioned occupations (medicine, law and ministry, amongst others) are considered professions, I ask the question: "What then constitutes the teaching profession?" Henceforth, I shall explore what the concept "teacher profession" refers to in this section, after which presuppositions will be derived that may enhance an understanding of the relationship between teacher autonomy and professionalism.

Warrior (2002: 59) proposes that teaching should be recognised as a profession. Teaching pupils, whether children or adults, is a service and a service combines knowledge with practice. Important to note is that professions do not exist without clients and therefore pupils are significant components in the teaching profession. In this respect the client (learner) not only demands theoretical knowledge, but also procedural skills. Furthermore, to render a service, teachers are a group of individuals who adhere to ethical standards, possess specialised knowledge, are accepted by the public and who apply knowledge and skills in the interest of others (Beaton, 2010: 4-5). I realised that the afore-mentioned views relates very much with the notion that:

“A profession is in possession of a body of special knowledge, practice within some ethical framework, fulfilment of a broad societal need, and a social mandate which permits a significant discretionary latitude in setting standards for education and performance of its members” (Pellegrino, 2002: 378).

Thus, if teaching is a profession, there must be a knowledge base. I do not mean that all teachers need to know exactly the same knowledge regardless of what or whom they reach in terms of their teaching practices. Rather, a knowledge base should have some form of conceptual unity or some basic form of theoretical knowledge that support a variety of teaching specialisations. From my experience as a teacher, I suggest that a knowledge base should specify the work of teachers. This implies that a knowledge base should specify what the work of teachers is, because it is practised within an ethical framework. Important about the ethics of the teaching profession is that the values that guide educational practices should be internal to the concepts that regulate practice (Reichman & Artzi, 2012: 2). For instance, one would not understand law unless one understands how its concepts and its practices are linked to justice. Also, one would not understand medicine apart from a concept of health. The same applies to education. One would not understand teaching unless one understands how its concepts and practices are connected to education. I therefore argue that the ethical concepts and values that regulate teaching practices should be internal to the knowledge base of teachers. To me, the afore-mentioned is also applicable to the teaching profession in South Africa.

The *South African Council for Educators* (SACE) (2000) serves as a statutory body that regulates the teaching profession and is applicable to all teachers in terms of the *Employment of Educators Act (Act 76 of 1998)*, *South African Schools Act (Act 84 of 1996)* and *Further Education and Training Act (Act 98 of 1998)*. SACE (2000) regulates the registration and professional development of teachers. It also sets, maintains and protects ethical as well as professional standards for teachers in this country (South Africa, 2000: Chapter 1, Section 3). Thus, teaching in South Africa seems to be in line with a plurality of understandings that surround the meaning of profession. For example, for teachers to be registered members of a profession, they should possess: “*little everyday knowledge, a moderate amount of practical knowledge, a high degree of formal knowledge and little tacit knowledge*” (Freidson, 2001: 34 and South Africa, 2000: Chapter 1, Section 2(a)). Along with knowledge, values are important to professions. Values give professions ethical credibility to do their work (Ferman, 2011: 48 and South Africa, 2000: Chapter 1, Section 2(c)). Furthermore, professional standards cover issues from compliance and regulations to codes of educational practices (South Africa, 2000: Chapter 2, Section 14).

I would like to indicate that the two preceding paragraphs (international and South African views) regarding the concept “*profession*” hold implications for *professionalism*. Professional standards, professional development as well as the exercise of specialised knowledge denote a particular version of professionalism. Such version can more likely be associated with control and regulation by government. Given such notions: “professionalism can be made to serve the interest of the state for control and containment of teachers or they can be effectively deployed by teachers to improve their terms and conditions of service and their enjoyment of social status and occupational autonomy” (Aseh, 2011: 180-181). It seems as if professionalism contributes positively to teachers’ ability to “effectively employ” their capacities. It also has negative connotations with “control” and “regulation” of teachers’ educational practices. For me, the preceding substantiates the relationship with *teacher autonomy in the profession* and subsequently about the relationship between teacher autonomy and professionalism. I shall explain such a relationship by means of three suppositions derived from the discussion in this section.

Supposition 1: *professionalism signifies teachers’ ability to dictate their own teaching practices independent of others and to exercise personal judgement.* This is in line with teachers’ capacity, freedom and responsibility to make choices regarding their own teaching

(*infra*: 2.2.6.2). I argue that a feeling of teacher autonomy is promoted as a trait of professionalism in the sense that control over one's own work is a defining feature of the teaching profession. Control is also closely related to other characteristics of professionalism, that of teachers' professional body of knowledge and professional expertise. This implies that teachers within the teaching profession would have the expertise to judge their own work, whilst they are free from control of others (Shafer, Park & Liao, 2002: 49).

Supposition 2: *there is a preferred version of professionalism implicit in how teachers are compliant technicians of curriculum implementation.* This version of professionalism sees the teacher as a compliant technician who implements policy in an uncritical and instrumental way (Sachs, 2001: 2). Here, teacher autonomy diminishes, because teachers are denied thoughtful consideration and opportunities to reflect. Speaking from my own teaching experience, teachers' professional knowledge and judgement pertaining to curriculum implementation is reduced by the mandatory application of professional standards on top of teachers' workload. Teachers thus have had no academic voice (*infra*: 2.2.6.1) which, according to Foucault (1988: 16), implies that teachers totally lost control over the ownership of their professional knowledge.

Supposition 3: *having autonomy need not entail absence of external influences, pressures, control, regulation or a mandate to act in the teaching profession.* This resonates with the notion that freedom is not conceived as the absence of constraint, but as the utilisation of power which circulates in the teaching profession (*infra*: 2.2.6.3). Thus, teachers may be self-determined even when acting in concurrence with internal and external demand, provided that they fully concur with or endorse doing so (Ryan & Deci 2006: 1560). Circumstances in the teaching profession must, however, engender in teachers a reason for willingly complying to have autonomy. Consequently, I argue that autonomy is not restricted to independent initiatives in the profession, but also applies to acts reflecting consent to external inputs or inducements.

On the basis of the preceding suppositions it is evident to me that there is a relationship between teacher autonomy and professionalism. For the teaching profession, a relationship manifests in how teachers' personal judgements, curriculum goals, educational standards and self-determination are linked with 'control', "regulation" and "effective employment of their capacities". Although teacher autonomy is portrayed as teachers' capacity, freedom and

responsibility to make choices concerning their own teaching, it becomes visible that education authorities often exert control over teachers. This materialises to the extent that teachers are limited by what they could do, how they worked and with whom they might exchange knowledge and information with (Jacklin, 2001: 24; Goehler, 2000: 44 and Baxen and Soudien, 1998: 131). Treating teachers as subjects over whom control can be exercised, inevitably limits teachers' abilities to do their work independently and as such, teachers are rendered as passive and obedient practitioners with little or no autonomy in the profession. Like Darling-Hammond (2001: 47-51) and Jacklin (2001: 24) I argue that for teachers, a loss of autonomy in the teaching profession not only implies disrespect for their knowledge and expertise, but also robs them from being effective teachers. Subsequently, whilst the teaching profession includes traits such as a strong knowledge base, adherence to codes of ethics and autonomy, professions have sought to achieve professional status.

2.3.2.2 Teacher autonomy in relation to being professional

The process of becoming a professional is always open-ended and incomplete. It entails developing and refining an embodied understanding of professional practice that integrates knowing, acting and being in the world. As such: "*Learning to become a professional involves not only what we know and can do, but also what we are (becoming). It involves the integration of knowing, acting, and being in the form of professional ways of being that unfold over time*" (Dall'Alba, 2009: 34). To me, such a view of being not only incorporates ways of knowing and acting, but also who teachers are as professionals. For instance, ask teachers what it means to be professional and they will usually refer to two things (Hargreaves, 2000: 152). First, teachers will talk about *being professional* in terms of the quality of what they do; and of the conduct, demeanour and standards that guide it. The academic literature typically subscribes to the latter conception as *professionalism*. Teachers will also talk about being *a professional*. This generally has to do with how teachers feel they are seen through others' eyes in terms of their status, standing, regard and levels of professional worth (Hargreaves, 2000: 152). I argue that *professionalism* is represented by the quality and actions of teachers in the education environment. Such argument resonates with Hargreaves & Goodson (1996: 4) that professionalism equates to manifestations of *professional culture*.

The connection between professional culture and professionalism are relevant to an examination of the substance of professionalism. An interpretation of professionalism as: “*something which defines and articulates the quality and character of people’s actions within a group*” (Hargreaves & Goodson, 1996: 4) may reasonably be presented as an interpretation of professional culture. My argument is that professionalism is largely constituted of professional culture, but it is also something more. Professionalism goes beyond professional culture by delineating the content of work carried out by the profession. This is reflected in accepted roles and responsibilities, key functions and remits, range of requisite skills and knowledge as well as the general nature of work-related tasks (Evans, 2008: 6). Thus, whilst professional culture may be interpreted as values and attitudes of working, I argue that professionalism seems to signify the identification and expression of what is expected from individuals in a profession. In this way, the unfolding of professional ways of being meets criteria of what it means to be a professional teacher in the South African education context.

In South Africa, teachers as *professionals* can be considered an important focus point of teacher reform since 1994. In 1995, the then Minister of Education announced that a new curriculum would be phased into schools for final implementation in 2005 (Robinson, 2002: 293). Known as *Curriculum 2005*, the new curriculum introduced to teachers principles like outcomes-based education, the integration of subjects into learning areas and an emphasis on learner-centred teaching methods. A comprehensive plan for implementation was introduced in 1997. With this implementation process, however, teachers immediately encountered educational challenges. From my teaching experience I recall that, notwithstanding the availability of financial, physical and human capacities, teachers were confused about new curriculum content and training that was not very effective. The training and re-training of teachers within the framework of the new curriculum were some of the challenges faced in the light of teacher reform. The afore-going include attention to teachers’ qualifications and the implementation of a process of quality assurance meant as an effort to improve the quality of teaching and learning.

Inevitably, new teaching practices, associated with new curriculum content, new educational structures and procedures, place professional demands on teachers. Educational demands, classified under the concept *professional*, may result in teachers struggling with the increase complexity of their working life, undermining of their motivation and the implementation of quality assurance processes are problematic (Robinson, 2002: 293). Based on the preceding

argument, I identify two suppositions that guide my thinking regarding *teacher autonomy in relation to being professional*.

Supposition 1: *authority structures, rules and regulations that affect the teacher as professional, are restrictive of teacher autonomy.* When teachers as professionals have to subject to hierarchical control, they are exposed to captivity from structures of dominance (Horsley & Thomas, 2003: 42). I offer the following example: teachers become less able to function autonomously because of their teaching load, lack of time, excessive paperwork, imposed educational policies as well as a lack of collegial and administrative support, amongst others. Also, teachers' responsibilities are strictly regulated; resulting in them experiencing little or no freedom as well as an increase in accountability (Wilches, 2007: 250). When teachers experience these kinds of constraints, I am of opinion that they are barely in a position to be autonomous. Consequently, teachers would have little opportunities to develop themselves so as to attain an autonomous mode of being (*infra*: 2.2.6.2).

Supposition 2: *the professional is subjected to accountability measures.* Being accountable implies disclosure to the self, the client, the employer and to the profession which leads to empowerment. When teachers are empowered, they feel positive about their work and may in turn be able to influence the work environment (Wade, 1999: 312). The afore-mentioned, I argue, has a direct link with the autonomy teachers have in the teaching profession. In this instance, teachers may be in a position to define and control their own teaching activities in the absence of external control. This implies the freedom to make discretionary decisions consistent with their scope of practice and the sovereignty to act on those decisions. However, accountability also holds undesirable consequences for teachers as professionals. Accountability in teaching has come to mean development of standards, educational licensing, increased supervision of teachers' work and sometimes teacher testing (Wilches, 2007: 249-250). Such liability has a diminishing effect on teacher autonomy in the sense that it may contribute to the erosion of the status of the teacher as a professional, increase of control, surveillance and a decline in trust conferred upon teachers (*infra*: 2.2.6.3).

The deliberation in this section validates the existence of a relationship between teacher autonomy and professionalism. From a Foucauldian stance, I maintain the view that such a relationship portrays professionalism as an action where teachers are transformed into subjects.

As Foucault (1975: 115) points out: “*the subject is not the speaking consciousness, not the author of the formulation, but in a position that might be filled in certain conditions by various individuals*”. This view depicts an enforcement of compliance within a determinate system of already existing educational norms and standards. For example, emphasis is put on the way teachers objectify and act upon themselves, that is, they see and create themselves as particular types of human subjects (Kipnis, 2011: 289). Thus, instead of teachers presenting themselves as responsible and autonomous actors, my teaching experience has taught me that education authorities desire subjects that will obey the caprices and dictates of government.

2.3.2.3 Teacher autonomy and professionalization

While the 1960's and 1970's were marked by a push for more equity in schools, with attacks on racial segregation and class-based tracking, the 1990's introduced a different kind of education all over the world (Labaree, 1992: 128). Given the afore-mentioned, educational critics indicated that schools were failing to provide adequate levels of academic achievement and this undermined worker productivity which threatened countries' competitive positions in the world economy. Professionalization emerged as one reaction to the mentioned problems indicated by critics. Professionalization comprises a sequence of events through which professionalising occupations pass, including the establishment of a training school, the founding of a professional association, action to secure protection by law and adoption of a formal code (Lowe & Gayle, 2010: 162). Such efforts to professionalise teaching are grounded on professional knowledge as a key element necessary to strengthen the professional status of teachers. For instance, teachers should master a formal body of knowledge that is not accessible to the layperson and that gives them special competence in carrying out a particular form of work.

The foundation of professional action is built on a *strong knowledge base* which plays a significant role in professionalism. Carr (2000: 91) posits that the education terrain needs professionals who are knowledgeable and well-informed about education as well as capable of expressing their knowledge. I get the impression that the teaching profession needs competent teachers, that is, individuals who are capable of applying educational theory, specialised knowledge and understanding during their teaching practices. Such knowledge is crucial, because teachers' professional knowledge should also be relevant and applicable to the needs of the society they serve (Carr, 2000: 15). In this instance, at a school where I

taught, teachers continually endeavoured to stay abreast of educational developments. In doing so, they demonstrated growth in the workplace and were able to account for decisions made at the interest of the profession itself and those served by them. In return, those teachers acquired monopoly over their area of work on the grounds that they were individuals capable to define appropriate forms of practice in their teaching environment.

International evidence shows that professionalization works effective when teachers reflect on their own practices and when their teaching practices are well co-ordinated (Department of Education, 2006: Section 7). In South Africa, the national and provincial education departments are obliged to provide an enabling environment for the preparation and development of teachers. However, it is the responsibility of teachers, guided by their own professional body, SACE, to take charge of their self-development by identifying areas in which they wish to grow professionally (Department of Education, 2006: Section 7). Based on SACE's instruction, I identify two suppositions in relation to teacher autonomy and professionalization.

Supposition 1: *professionalism assumes the provision of an enabling environment for the preparation and development of teachers.* In this instance, teachers are afforded opportunities to reflect on their own practices in the light of both their professional knowledge and their particular teaching contexts (Bransford, Darling-Hammond & Le Page, 2005: 3). From this perspective, I argue that teachers' practices become the innovation of knowledgeable and creative acts about classroom practices and curriculum development, amongst others. Subsequently, the provisioning of an enabling education environment conducive to teacher development may support the enhancement of teacher autonomy. Teachers may develop confidence and competence to engage critically, not compliantly, with curriculum development, standards related to in-service training, discipline and professional practices of teaching, amongst others. Consequently, this gives teachers control over their teaching practices and judgment of their competence (*infra*: 2.2.6.1).

Supposition 2: *teacher autonomy is manifested in teachers' responsibility to take charge of their self-development.* Teachers have an obligation to assume personal responsibility to improve their teaching practices (Hyslop-Margison & Sears, 2010: 2). To me, this implies that teachers not only ought to critically engage with contemporary ideas about teaching and learning, but also explore and critique widely accepted knowledge and ideas. Thus, while

engaging in developmental activities, teacher autonomy may be enhanced. For example, teachers create opportunities where their voices are heard, their experiences affirmed, their lives valued and their knowledge and skills asserted (Ayers, 2004: 102). The latter, I argue, may contribute to teachers taking charge in becoming self-determined individuals, free educational agents, conscious meaning makers and self-activated professionals (*vide*: 2.2.6.3).

The foregoing suppositions strengthen my understanding regarding a relationship between teacher autonomy and professionalism. Professionalization is therefore not merely a means to an end. Rather is it a process through which professionalism is acknowledged, increases the significance of teacher autonomy. Thus, professionalization becomes a perpetual process through which teacher autonomy is articulated, informed and renewed (Kennedy, 2007: 100). For example, teachers are positioned to negotiate their membership in the teaching profession and are afforded opportunities to articulate their own professional identities.

The analysis regarding teacher autonomy and professionalism in this section indicates degrees of overlap between these two discourses. This assists me to explain the use of expressions such as “teacher autonomy in the teaching profession”, “teacher autonomy in relation to being professional” and “teacher autonomy and the professionalization project”. To illustrate, it is noteworthy that whilst teachers in the profession are afforded autonomy in the workplace, they also experience rigid accountability measures which diminish their abilities to be autonomous. Consequently, the analyses I conducted, provide a means through which deconstructive insights regarding the relationship between teacher autonomy and professionalism can be construed.

2.4 DECONSTRUCTIVE INSIGHTS FROM THE RELATIONSHIP BETWEEN TEACHER AUTONOMY AND PROFESSIONALISM

I shall extract phrases from section 2.3.2.1-2.3.2.3 to expound deconstructive insights from the indicated relationship between teacher autonomy and professionalism.

Table 7: Insights derived from extracts:

| | Extracted quote(s) | Deconstructive insights from the indicated relationship between teacher autonomy and professionalism |
|----------|--|---|
| 1 | “...teachers within the teaching profession would have the expertise to judge their own work” (<i>infra</i> : 2.3.2.1); and “...teachers have totally lost control over the ownership of their professional knowledge...” (<i>infra</i> : 2.3.2.1). | <i>Professional knowledge informs the significance of teacher autonomy and professionalism</i> |
| 2 | “...becoming a professional involves not only what we know and can do, what we are” (<i>infra</i> : 2.3.2.2). | <i>Teacher professional identity yields a richer understanding of the teacher self</i> |
| 3 | “...provision of an enabling education environment conducive to teacher professional development...” (<i>infra</i> : 2.3.2.3). | <i>Teacher professional development stimulates autonomous and professional relevance</i> |

The afore-mentioned deconstructive insights will be discussed individually below.

2.4.1 Professional knowledge informs the significance of teacher autonomy and professionalism

Furlong (2000) observes that:

“It is because professionals face complex and unpredictable situations that they need a specialized body of knowledge; if they are to apply that knowledge it is argued that they need the autonomy to make their own judgements. Given that they have autonomy, it is essential that they act with

responsibility – collectively they need to develop appropriate professional values” (Furlong, 2000: 18-19).

Considering the above, I recognise the need for a specialised body of knowledge as a component idea of both teacher autonomy and professionalism. Professions are occupations which: “*possess a monopoly of some esoteric and difficult body of knowledge*” (Robson, Bailey & Larkin, 2006: 185). Such knowledge is socially useful knowledge and as noted in Furlong’s observation (2000): “*judgement and discretion must be used in its application*”, such application of knowledge is closely tied to the autonomy of teachers. As a result, if teachers are allowed to freely use their specialised body of knowledge, substance is given to a relationship between teacher autonomy and professionalism. Although such relationship is always in reality negotiated and may be restricted, teachers may critically utilise their specialised knowledge and autonomy to inform their professional practices.

Therefore, whilst a professional body of knowledge informs significance of teacher autonomy and professionalism, I propose the following deconstructive insights:

Insight 1: Professional knowledge may contribute to teachers’ understanding of their roles as professionals, whilst it is also concerned with those norms and values they wish to achieve (*vide*: Ponte, Ax, Beijaard & Wubbles, 2004: 574). My interpretation is that teachers are placed in an autonomous position to accomplish the desired outcomes of their teaching practices.

Insight 2: Professional knowledge, which may be used by policymakers and education administrators, amongst others, to regulate the conduct of teachers, entails constraint, regulation and disciplining of practices (*vide*: Foucault, 1977: 27). I consider such regulation as an underscoring of the deterioration of teacher autonomy in the form of isolation, disenchantment, alienation and resistance to meaningful participation.

Significant about the prior insights is that professional knowledge includes the quality of teachers’ work as well as standards that guide teachers’ actions. This resonates with a view I detected in the *Norms and Standards (2000)* which provides an outline of the knowledge, skills and values that are considered hallmarks of professional and competent teachers in this country (Department of Education, 2000b: Section 5). This, in the words of Hilferty (2008:

162) is referred to as *professionalism* which represents the set of knowledge, skills and values that guides teachers' professional practice and autonomous actions. From my perspective, professional knowledge constitutes subjectivity of teachers and exertion of power over teachers which may be pivotal to the formation of teachers' professional identity.

2.4.2 Teacher professional identity yields a richer understanding of the teacher self

Between the cultural, social and political narratives of teaching, the situated nature and contingency of all teaching practices, the question of *teacher professional identity* emerges. Drawing on my teaching experience, it seems not to be strange that Vloet & Van Swet (2010: 149) indicate that teacher professional identity can be conceptualised as the stories professionals tell about themselves. Also, Foucault who insists: "*Do not ask me who I am and do not ask me to remain the same*" (Danaher, Schirato & Webb, 2000: 1). Interpreting the latter authors' views, identity seems to be fashioned and constructed in continuous negotiation, discussion and cooperation which imply that identities are both given and achieved. It is almost as if teachers have to continually work on the self, while also considering how to be and act in relation to others. By this I mean that identity formation appears to be dependent on teachers' ability to create and change things with their pre-positioning in educational events and unremittingly develop a sense of self in their engagement with the world (with learners, colleagues, the community, amongst others).

Consequently, during the development of their identities, teachers seemingly develop competencies as self-determined, socially responsible and critically aware participants in educational environments. The latter highlights teacher voice, respect for others, negotiation, cooperation and interdependence (Jiménez Raya, 2007: 33). Contrary to Jiménez Raya (2007), I argue that teachers would be afforded opportunities for choices (autonomy) as well as for responsibilities and duties (professionalism). Therefore, while teachers may apply autonomy to regulate their practices, they apparently are also committed to the common good of the education profession.

The preceding arguments denote a view of teacher professional identity as a space of agency which exists within the social process of becoming a teacher (MacLure, 1993: 311) and as such I suggest the following deconstructive insights regarding teacher identity:

Insight 1: The establishment of teacher professional identity may be referred to as the achievement of a certain mode of being that contains characteristics of an individual's notion of an autonomous being (*vide*: Foucault, 1992: 27-28). I regard the latter as an achievement of mastery over themselves and their educational practices which require from teachers to act upon themselves, to monitor, test, improve and transform themselves in the teaching profession.

Insights 2: Teacher professional identity theoretically contains constructions of the self as positional, positioned and self-other positioning. This implies that identity is both discursively and structurally constructed (Osgood, 2006: 12). The self retains an element of human agency (choice - autonomy) and structure (subject as positioned and actively positioning the self and others within educational discourse - professionalism). It therefore seems that teacher identity, in line with autonomy and professionalism, is constructed and reconstructed in teachers' interaction with people in their educational contexts.

Based on the afore-going deconstructive insights, teacher professional identity refers to the type of person an individual is recognised as being in a given educational context. For example, teachers repetitively negotiate and reflect on the educational situated aspects of their roles which contribute to the formation of their professional identities (O'Connor, 2008: 118). For instance, in South African education, one of the objectives of the education department is to enhance the professional education and accreditation of teachers (Department of Education, 1996: Section 4(f)) as a way of strengthening the image of teachers. This may either be witnessed by the way teachers willingly (autonomously) invest their sense of self in their work or by the way they interpret educational demands placed upon them in the teaching profession. This understanding of teacher professional identity resonates with the notion that identity formation is a social matter, because the negotiation and growth of self takes place in institutional settings such as teacher education programmes and teacher development initiatives.

2.4.3 Teacher professional development stimulates autonomous and professional relevance

The environments in which teachers work and the educational demands (growth in knowledge and teaching methodologies, amongst others) placed upon them, foregrounds the

importance of teachers' professional development. According to Mestry, Hendricks & Bisschoff (2009: 477), professional development can be interpreted as: "*a process by which teachers review, renew and extend their commitment as agents to the moral purposes of teaching; and by which they acquire and develop their knowledge, skills and attitudes*" (also: Day, 1999: 4). If this would be the case, I argue that teacher professional development may be considered complementary to the relationship between teacher autonomy and professionalism. Firstly, I consider "review, renew and extend" as an action of teachers to contribute towards self-directed professional action. Teachers may be considered autonomous in the sense of developing personal responsibility for their teaching via continuous reflection as well as affective and cognitive control of their professional teaching practices. Secondly, professional development via "the acquisition of knowledge" may further strengthen teachers' right to freedom from control by others. Teachers may be autonomous in the sense of been aware of why, when, where and how pedagogical skills can be acquired. It also encompasses choice as an important element in their professional teaching practices.

Although it seems that professional development affords teachers opportunities to affect their own means, education departments facilitate professional development opportunities as a means to managing teachers. Such managerial exercise in the name of professionalism may result in teachers to be subjected to a myriad of judgements, measures, comparison and targets (Ball, 2003: 220). Within the latter, there is a high degree of uncertainty and instability, resulting in unhelpful and damaging educational practices.

Based on the preceding deliberation, I offer the following deconstructive insight:

Insight 1: Professional development should place emphasis on self-directed teacher learning, because it focuses on teachers' growth as human beings and permanent learners. My point is that professional development can be regarded one of the main requirements of modern day's society and one of the main sources of personal and professional satisfaction. Professional development therefore affords teachers a position to engage with their own practices, to engage with the world and an opportunity to frequently reflect on their own teaching practices (*vide*: Ramos, 2006: 189).

Professional development can therefore be considered broader than mere career development and staff development. The main focus of career development is on the growth that occurs as

teachers move through the professional career cycle (Glatthorn, 1995: 41). Staff development, on the other hand, emphasises the provision of organised in-service-programmes designed to foster the growth of groups of teachers (Glatthorn, 1995: 41). Both these methods of development may be considered systematic interventions for teacher development. For instance, as a former teacher and principal I am well aware of the implementation of the *Integrated Quality Management System (IQMS)* in schools to improve education in South African. IQMS aims at identifying specific needs of teachers and providing support for continuous growth, promoting accountability monitoring and overall effectiveness (Mestry *et al.*, 2009: 478). In my experience, the professional development of teachers is to be considered a long-term process that includes regular opportunity and experiences planned systematically to promote growth and development in the profession. The idea of such development would be to foster a new image of teacher learning, a new model of teacher education, a revolution in education and even a new paradigm of professional development.

2.5 CHAPTER SUMMARY

My research question for this chapter was: **what insights regarding the relationship between teacher autonomy and professionalism may be derived from academic literature?** In answering this question, I started this chapter with the assumption that one would focus on more than just seeking for definitions regarding teacher autonomy and professionalism. From a postmodern deconstruction methodology, I explored multiple meanings of *teacher autonomy* and *professionalism* by means of definitions and concepts relating to these discourses. The purpose was to *see through* the concepts, to get a better grasp of the similarities and differences that conceptual analyses of this kind were able to pick up (Hirst and Peters, 1998: 33).

As such, I explored teacher autonomy in terms of *self-direction; lifelong learning; critical reflection; opportunities for transformation* and *teacher identity*. For me, these concepts illustrate that teacher autonomy can be viewed as teachers: “*having a strong sense of personal responsibility for their teaching, exercising via continuous reflection and an analysis of the highest degree of affective and cognitive control of the teaching process, and exploring the freedom that this confers*” (*vide*: Little, 1995: 179). This notion of teacher autonomy has with in it a tolerance of uncertainty, willingness to venture into the unknown

and the ability to understand and deal with the complexity of pedagogical practices in schools.

Because autonomy is generally perceived as a quantifiable characteristic of an individual, I expressed the view that teacher autonomy can be portrayed as a mark of robust professionalism. This view in mind, the conceptual analysis revealed that professionalism can be viewed as the manifestation of the optimal attitudes and behaviours advocated in vocations known as professions. Teachers as professionals within the education profession signify individuals who are professing to the world things of great value for the greater good (*vide*: Coulehan, 2005: 892-898). Professionals provide services through the use of specialised knowledge and experience with the intention of holding themselves to the highest standards of thought, word and deed.

As noted earlier in this chapter, a conceptual analysis of teacher autonomy revealed a relationship with professionalism. In the concept of professionalism, teacher autonomy holds a central position. Teacher autonomy is regarded as a prerequisite for teachers' own professional growth and also a result of professional training. Such a position seems to restore the role of teacher agency to models of teacher professionalism by showing that teachers are not passive victims of an education system. Instead, professionalism entails a choice in the sense that: "*The politics of professionalism are partly about government actions that affect teachers but they are also about the ways in which teachers choose to respond and choose to publicly depict themselves*" (McCulloch, Helsby & Knight, 2000: 118). Here the intention would be to allow teachers to be reflective of their own teaching practices, act as active and informed citizens and to make meaningful contributions to their own development, the school as profession as well as to the broader society they find themselves in.

After establishing that a relationship between teacher autonomy and professionalism exist, I adhered to my research question by deriving deconstructive insight from the afore-mentioned kinship. To reiterate, the derived deconstructive insights exposed that teachers' professional knowledge, identity formation and professional development constitute understandings of teacher autonomy and professionalism. Regarding such an understanding is the notion that autonomous teachers have capacities that are exercised through choice and action, whilst they are also rendered subordinate by demands from education policy and administrators, amongst others.

Thus, although this chapter disclosed some enlightenment regarding teacher autonomy and professionalism, policy archaeology asserts that investigation into deeper meanings of discourses does not stop with an analysis of concepts. Policy archaeology is premised on the idea that there are networks of regularities with a certain generative power by way of producing categories of thought and ways of thinking about discourse under study (O'Connor, 2005: 10). Thus, to think differently regarding teacher autonomy and professionalism, I intend to explore South African education policies in a globalised context to uncover regularities (Chapter 3) that will later be used as criteria to conduct a policy archaeology (Chapter 4). My reason for this is because:

“Globalization has become an influence in nation states’ social reforms as education sectors adjust to the new global environments that are characterized by flexibility, diversity, increased competition and unpredictable change. Understanding the effects of globalization on teaching and learning is essential for any policy maker, reform designer and educational leader” (Sahlberg, 2004: 67).

Globalisation requires a different way of thinking and understanding regarding educational discourses (like teacher autonomy and professionalism). Such a requirement is in line with a Foucauldian view which indicates that: *“instead of legitimizing everything you know, think differently”* (Foucault, 1985: 9). It is also in line with postmodern deconstruction as my research methodology, because, instead of being satisfied with what this chapter revealed about teacher autonomy and professionalism, the next chapter will focus on answering the question: **which regularities in South African education policy may be identified as frames of analysis to conduct a policy archaeology?** The uncovering of regularities is geared to creating archaeological thinking in preparation of conducting a policy archaeology of South African education policies to explore innovative perspectives regarding teacher autonomy and professionalism.

CHAPTER 3

REGULARITIES WITHIN SOUTH AFRICAN EDUCATION POLICIES IN A GLOBALISED CONTEXT

3.1 INTRODUCTION

After 1994, the aim of the South African Department of Education (SADoE) has been to transform the national and training system inherited from its apartheid past. Not only does this mission encapsulate a contribution towards building a democratic South Africa, but also a response to the challenges of the global era (Department of Education, 2000a: Section 4.1). SADoE holds the view that globalisation contributes to the widening, deepening and speeding up of interconnectedness of education within the global world. For me, this departmental view implies that schools can no longer be considered as isolated institutions of society, but rather as organisations that are connected to the global world, irrespective of where they may be situated. Thus, although their vicinity may differ and even though schools may respond differently to the challenges of globalisation, the global reality is that education prepares schools, education managers and teachers, amongst others for academic functioning in line with the global order (Meyer, Bushney & Ukpere, 2011: 6570). Therefore, South African education has taken a conscious decision to understand the form and function of globalisation and to locate itself within such an international context.

In response to global challenges on education worldwide, educational policy reforms has seen the articulation of a new educational agenda for South African education. Thus, while educational changes amidst globalisation prompts new developments pertaining to South African education policies; such developments can be linked to globalisation. For example, *Outcomes –Based Education* (OBE, 1994), takes its cue from early competency debates in Australia, the *National Qualifications Framework* (NQF, 1995) relies heavily on New Zealand education policy, whilst the *Quality Assurance System* (QAS, 1994) is strongly informed by developments in the United Kingdom (Jansen, 2002: 44). What I find interesting regarding the preceding examples of policy borrowing, is that South Africa draws liberally from policies and policy ideologies in the West in finding its own education system. Both *Education White Paper 3*: “This national agenda ... often typified as globalisation” (Department of Education, 1997b: Section 1) and *National Plan for Higher Education*:

“These challenges have to be understood in the context of ...globalisation” (Ministry of Education, 2001: 9) confirm my preceding claim.

South African education policies amidst globalisation have been issued with a compendium of regulatory arrangements and legislative statements. Jansen (2002: 43) notes that the NQF (1995) inaugurates a system of credits and qualifications that would create self-regulated individuals. Also, the education system developed *Key Performance Indicators* (KPI) which would be the basis upon which the entire South African education system could be regulated and controlled. Regulatory arrangements in South African education policies imply that schools as well as teachers are required to subject themselves to control mechanisms such as efficiency, accountability and performance (Jansen, 2002: 4).

Regularities in education policy aim to restructure; redistribute and disrupt what teachers, amongst others can and cannot do regarding their teaching practices (Thomas, 2005: 52). If this is the case, I argue that regularities can be considered part of education policy discourse - a discourse that positions teachers in a particular way. Such discourses provide a means for the regulation of teacher autonomy and subsequently professionalism. To understand how teacher autonomy and professionalism are regulated, I intend to respond to a stipulation in SAdoE (2000) which advises that one should: “engage critically and creatively with global imperatives in education policy discourse” (Department of Education, 2000a: Section 4.1). Therefore, I intend to critically engage with South African education policy in a globalised context to find regularities that can be utilised as frames of analysis to explore innovative perspectives regarding teacher autonomy and professionalism.

In view of exploring innovative perspectives regarding the afore-mentioned discourses, this chapter aims at answering the question: **which regularities in South African education policy in a globalised context may be identified as frames of analysis to conduct a policy archaeology?** In response to this question, this chapter commences with a deconstruction of globalisation. I then provide an elucidation of globalisation and education policy with reference to a general overview in relation to Western and African countries. Thereafter, I shall provide an outline regarding globalisation and South African education policy. This is important, because I intend to search for regularities in South African education policies in a globalised context. I shall proceed with a gestalt on regularities after which three South African policies will be analysed. The purpose of analysing the *Norms and Standards for*

Educators (2000), *National Framework for Teacher Education, Development in South Africa (2006)* and *Continuing Professional Teacher Development (CPTD) System (2008)* is to search for regularities which will be used to conduct a policy archaeology to explore innovative perspectives on teacher autonomy and professionalism.

For me, a deconstruction of globalisation in this study is important, because I argue that when it comes to education policies, one should take cognisance of globalisation's aim regarding innovative thinking about teachers' work. For instance, in this section I have argued how globalisation changes the rules of thinking about teacher autonomy and professionalism in the sense that it shows how discourses under study do not have definable meanings and that they exceed the boundaries they may occupy (Caputo, 1997: 31 and Romer, 2010: 94). It is clear to me that there seems to be no way that meaning can be presented in its totality at any given point of argumentation. Therefore, I argue that if globalisation, in terms of South African education policies is to be deconstructed, one would realise the impossibility to totalise meaning regarding discourse under study (*vide*: Biesta, 2001: 46). To prevent totalisation of meaning, a deconstructing of globalisation will enable me to label regularities, make it nameable and describable so as to expose innovative meanings of teacher autonomy and professionalism (*supra*: Chapter 4).

Since I have just briefly indicated the significance of globalisation in relation to South African education policies, my logical next step would be to conduct a deconstruction of globalisation.

3.2 DECONSTRUCTING GLOBALISATION

Notions of globalisation have grasped many an intellectual imagination over the past two decades. However, the concept "globalisation" lacks a precise definition. The absence of a specific definition is unfortunate, because it makes it difficult to assess the usefulness of the concept. Therefore, I intend to explore possible meanings of globalisation in this section in terms of its relevance in this study.

Although the term "globalisation" was not coined until the second half of the twentieth century, it has a longer pedigree. In the English language, the noun "globe" dates from the fifteenth century derived from the Latin "globus" and began to denote a spherical

representation of the earth several hundred years ago (Robertson, 2001: 6254). The adjective “global” entered circulation in the seventeenth century and began to designate in the late nineteenth century in addition to its earlier meaning “spherical”. The verb “globalise” together with the term “globalism” appeared in the 1940s (Reiser & Davies, 1944: 212, 219). As a result, the term “globalisation” first surfaced in the English language in 1959 and entered a dictionary two years later (Schreiter, 1997: 5).

In view of the afore-going historical view, Jessop (2002: 124) posits that globalisation cannot be seen as a unitary causal mechanism, but rather as the complex emergent product of many different forces operating on many scales. As such, “globalisation” is a heterogeneous process. It has economic, cultural, political and educational dimensions and is made up of erratic flows of capital, goods, services, labour, ideas and knowledge (Aasen, Prøitz & Sandberg, 2013: 65). These flows all contribute to an increasing synchronicity of demands and change in traditional structures of meaning. Consequently, “globalisation” takes place both in a transitive sense, referring to something which is made to happen and in an intransitive sense, referring to something that happens. The latter not only refers to the emergence of large scale world systems, but also to transformations in the very texture of everyday life (Giddens, 1996: 367-368).

Albeit uncertainty regarding an exact explanation of globalisation, I consider a depiction by Shaw (1999) suitable to be utilised in this study. The author asserts that:

“Globalisation refers to the global effects, notoriously unintended and unanticipated, rather than to global initiatives and undertakings. It is not what we all, or at least the most resourceful and enterprising among us, wish or hope to do. It is about what is happening to all of us” (Shaw, 1999: 419).

Of significance to me is Shaw’s observation: *“It is about what is happening to all of us”*. In response to such a remark, Burbules & Torres (2000: 14-15) assert that globalisation, at the very least, affects people all over world in terms of the *economy, politics, culture and education*. In *economic terms*, there is a rise in internationalised advertising and consumption, investment across national borders, free flow of goods as well as new pressures on the roles of workers in society. In *political terms*, there is a loss of nation-state

sovereignty, an erosion of national autonomy and the notion of the citizen as a unified and unifying concept- a concept that can be characterised by precise roles, rights, obligations and status. In *cultural terms*, there are tensions between the ways in which globalisation brings forth more standardisation and cultural homogeneity while it also brings more fragmentation through the rise of locally oriented movements. In *educational terms*, globalisation is reflected in an educational agenda that privileges policies for teacher regulation, standards, instruction and testing, amongst others (Ball, 1999a: 2).

Subsequently, whilst globalisation regulates peoples' actions in the market economy, politics and culture, education inevitably responded to such global regularities. Such global regularities are present in worldwide reforms which raise educational standards in the emergence of new education policies (Ball, 1999a: 2). For me, the prior arguments regarding globalisation is a sign that the work of the teacher and indeed what it means to be a teacher is inevitably affected by the way globalisation influence education. My point is that teachers are fundamentally reconfigured as responsive to specific requirements and specified targets in view of educational practices in a globalised context. As Ball (1999) puts it: "*The global trends of school improvement and effectiveness, performativity and management are working together to eliminate emotion and desire – rendering the teachers' soul transparent, but empty*" (Ball, 1999b: 26).

What manifest from the above is what Ball (1999b: 26) calls: "*a reconstruction of the teacher*". The reconstruction of teachers can *inter alia* be observed in the governing control over teachers' agency. As teachers are re-territorialised and reconstructed, it is necessary to understand how globalisation constitute a manifest destiny relevant to teacher autonomy and professionalism. A manifest destiny depicts an agenda which gives meaning and legitimises teachers' relationships and identities (Chiodo, 2000: 203 and Rizvi, 2007: 121). Such agenda of globalisation may be derived from indications in the previous as well as this paragraph: "*a teacher is also affected by the way globalisation influence education*"; and "*the governing control over teachers' agency*". I argue that the latter view designates how teacher autonomy and professionalism are regulated in complex social contexts, within social relations and via the exercise of power in educational settings. To explain: the regulation of teacher autonomy and professionalism materialise through continuous education reforms accompanied by exogenous monitoring and accountability schemes - rendering the teaching field as a complex social context (Tatto, 2006: 232). Socially, globalisation encourages new patterns and

lifestyles which challenge traditional notions of teacher identity in the social relations teachers find themselves in (Tatto, 2006: 232). Also, power relations significantly effects teachers particularly in the following sense: “*teachers’ autonomy, independence, and control over their work is being reduced while workplace knowledge and control find their way increasingly in the hands of administrators*” (Tatto, 2006: 232).

Interpreting Tatto’s views (2006) I argue that *complexity in social contexts; social relations, and the exercise of power* in terms of globalisation calls for innovative thinking about teacher autonomy and professionalism. My argument is that the afore-mentioned attributes is significant, because it becomes tools which to conceptualise the meaning of globalisation relevant to the search for regularities to later explore innovative perspectives regarding teacher autonomy and professionalism.

As a result of its significance *complexity in social contexts; social relations and the exercise of power* will next be elucidated.

3.2.1 Complexity in social contexts

In the 1990s, a science of complexity addressed the: “*ancient idea that within life and the cosmos there might be fundamental ordering process*” (Albrecht, 2001: 409) to understand how interactive and dynamic systems around the globe behave as highly interconnected parts. Such systems represent the sharing of ideas, methods and experiences which influences individuals’ sense of becoming in a globalised context. In the light of the afore-going, I intend to explore the relevance of “*complexity in social contexts*” in this section to understand what information such complexity may reveal about teacher autonomy and professionalism.

Complexity in social contexts amidst globalisation is based on a network of interconnections, interactions and interdependencies between many actors who make it possible and within which causative actions, information, knowledge and influences are propagated almost instantaneously (Rupérez, 2003: 250). By its very nature, globalisation affects notions of space and time as well as reformulation of meaning and understanding within the sphere of complexity. Therefore, complexity is oriented to an understanding of how interactive and interconnected components in social contexts behave. Fundamentally, I assume that individuals are socialised to adapt to the needs of a specific society. In my opinion, the basic

premise here is that individuals are organised to cooperate within an institutionally based social context. In education, arguably, curriculum developments, changing management strategies and rapid changes in the knowledge economy, amongst others, intend to transform modes of social interaction in schools. One point becomes fairly clear: such complexity amidst globalisation modifies the role of teachers in schools. My views are justified by Spring (2008: 334) who asserts that, within such complexity, the role of human choice or agency is not considered. Teachers seem not to be free to make educational choices, but have to adapt to increasingly complex technical exigencies of social existence.

As such, social contexts can become more differentiated and complex as individuals' dependence deepens and the institutional demands of social existence evolve (Prasch, 2000: 222). Here, the relationship between individuals and their existence in social contexts can be labelled as *dialectical* in the sense that:

“Individual beings do not exist in isolation, but arise as a consequence of social life, yet the nature of that social life is a consequence of our human being” (Rose, Kamin & Lewontin, 1984: 11).

What becomes visible to me regarding the prior view is the ways in which teacher autonomy and professionalism are problematized. Here, *“do not exist in isolation”* reveals meaning regarding the status of teachers in terms of their autonomy and professionalism. I am of opinion that teachers' positions in globalised contexts are reduced to that of collegial dope which places the individual teacher in some kind of mediated action in the school. The implication is that teachers do not operate with agency and free will, but they become individuals with a regulated personhood in the middle of actions happening at the school (*vide*: Wertsch, 1998: 36).

In terms of the deconstruction in this section, I contend that globalisation can be conceptualised as an evolutionary processes that continuously creates newer and greater complexity which manipulates human lives (teachers) in terms of their autonomy and professionalism. Consequently, globalisation's complexity in social contexts operates closely in tandem with the social relations teachers experience at schools. This happens because globalisation brings along values and beliefs which intensifies the social relations between people (teachers) in such a way that their autonomy and professionalism are influenced (*vide*:

Castells, 2009: 117). In view of the prior indication, I shall discuss social relations as a significant indicator of globalisation.

3.2.2 Social Relations

Agbaria (2011: 69) observes that the way in which globalisation has been constructed and played out in education sites is yet uncharted and needs to be mapped. In this section I intend to map globalisation in terms of “*social relations*” and how teacher autonomy and professionalism are sculpted in such relations. My exploration is based on the presupposition that:

“Globalisation is seen as a process (or set of processes) which embodies a transformation in the spatial organisation of social relations and transactions – assessed in terms of their extensity, intensity, velocity and impact” (McGrew, 2000: 3).

As a social process in which space is essentially eliminated as a factor in social relations, globalisation alters the nature of global relations. This occurs by lifting relationships out of the territorial and placing them into the meta-territorial and as such, globalisation subjectively alters people’s experience (Garcia, 2007: 305). For me, it seems as if globalisation transforms and extends social interactions beyond national boundaries and in so doing creates different kinds of social relationships at a global level. Thus, if globalisation changes the way in which individuals conduct social relations, the manner in which individuals are regulated in such relations, changes as well (Keohane & Nye, 2000: 108).

From Garcia (2007) and Keohane *et al.*’s (2000) views, I deduce two implications for teacher autonomy and professionalism. First, teachers as professionals are in no way free to develop their professional knowledge in ways they thought fit in social relations in schools. This, if related to my own teaching experience, is because teachers’ capacities for creativity and choice could be limited due to the pace of change and acceleration of paradigm shifts in schools. Prescriptive education policies, standardisation and new teaching methods, amongst others, are evidence of how teachers are subjected to change their views regarding education realities amidst globalisation. Consequently, the challenge for teacher autonomy and professionalism is that teachers’ options and choices are informed by the social relations they find themselves in. My argument is that teacher autonomy and professionalism may be

regulated by the knowledge, customs, practices and understanding individuals bring to schools as social environments. Second, the way in which teachers are regulated in social relations not only inform decision making and actions taken in schools, but also how decisions and actions relate to their sense of self and their social embedded reality. For example, teacher regulation in social relations can suppress individuality, foster complacency and lead to conformity. The preceding implications suggest that, instead of having established a complete new set of social relations, globalisation seemingly contribute to less teacher autonomy, less control over teaching practices, professionalism and an increased autocracy in schools (Quicke, 2000: 305).

In terms of the discussion in this section, I hold the view that the way in which teacher autonomy and professionalism are regulated in social relations makes it possible to realise how globalisation regulates teachers' lifestyles, the way they present themselves, the way they are represented and the way people are transformed in social relations.

From an educational perspective I am convinced that such regulation, as indicated above, not only signifies a creation of new lifestyles and new representations, but also how power is exerted over teachers. The exercise of power in terms of globalisation brings practices of discipline, surveillance and constraint, but also makes possible the search for new knowledge regarding teacher autonomy and globalisation, amongst others (*vide*: Rouse, 2005: 2). Therefore, the *exercise of power* in terms of globalisation will be explored in the next to probe its significance in terms of the discourses under study.

3.2.3 The exercise of power

Foucault's proclamation that power is everywhere, an inescapable web, is often quoted by social scientists. However, this French philosopher also claims that power as such does not exist – despite having spent so much of his time analysing the phenomenon. Nevertheless, I want to argue that Foucault's writings on power offer fascinating and insightful perspectives that can be associated with globalisation. Therefore, in this section I intend to explore the concept “power” in relation to globalisation and subsequently how it contours teacher autonomy and professionalism.

The exercise of power often produces new gestures, actions, habits, skills and ultimately new kinds of people are produced (Rouse, 2005: 4). This is confirmed by Foucault in his book, *Discipline and Punish* that:

“The human body was entering a machinery of power that explores it, breaks it down and rearranges it. It defines how one may have a hold over others’ bodies, not only so that they may do as one wishes, but so that they may operate as one wishes, with the techniques, the speed and the efficiency that one determines” (Foucault, 1970: 138).

My interpretation of Foucault’s view above is that power execution can easily contribute towards the individualisation of persons. Such individualisation, according to Deacon (2006: 123) intends to rule individuals in a continuous and permanent way, thus regulating what and how people should conduct themselves in life. For instance, as an educationist I am quite aware how the execution of power contributes to the regulation of individuals by means of assessment, standardisation as well as teacher training and testing, amongst others. At schools, the *Integrated Quality Management System* (IQMS) (2004) is implemented to, on the one hand stimulate professional development, although it also makes room for accountability, monitoring of teachers’ work and to evaluate educators’ performance (*vide*: Department of Education, 2005: Section 1). Because of its multiplicity, IQMS is: “a tool to control educators coded with sugar to make it palatable to teachers” Gardiner (2003: 28). Therefore, I argue that, although IQMS is supposed to enhance quality in school, the establishment of such quality is disguised in power execution which regulates schools and teachers through a framework of planned goals, objectives and standards. I am familiar with the latter indicators in IQMS and can therefore indicate that the execution of power can be associated with a way of ordering as to how teachers should act in terms of their educational practices at schools.

If the exercise of power is to be aligned with globalisation, it becomes possible to see why globalisation is taken as a way of knowing and ordering the world (Sidhu & Christie, 2007: 7). Such exercise of power is a signal to me how teachers, their actions, attitudes, teaching practices and everyday lives are regulated in globalised contexts. This view of power points to the way teacher competences are explained in terms of teacher standards, prescriptive outcomes-based curricula and systems of accountability which are forced upon teachers.

Consequently, the way in which power operates in regulating teachers' work leads to the reconstruction of their identities in changing global contexts in teaching (Flores, 2005: 403).

If globalisation is to be conceptualised in terms of the discussion in this section, I argue that it is regulatory in terms of where education should go to and, for instance, what teachers should do. This implies that there is a tendency towards factorising education in the sense that teachers are made an automaton, a mere factory hand. If this happens, teachers are to mechanically and unquestionably carry out the ideas and orders of those clothed with the authority of position in education (Herbst, 1989: 192).

This section has aspired to briefly show how globalisation operates to regulate education and subsequently the work teachers do. Teachers live and act in global educational societies that are characterised by, amongst others complexities in *social contexts*, *social relations* and *the exercise of power*. In terms of the discussion of all three prior-mentioned attributes, I now conceptualise globalisation in terms of teacher autonomy and professionalism as:

“A process of power which intensifies teachers’ regulation with the aim to contribute to a transformed version of what teachers’ could be” (my own articulation).

With a *“transformed version”* I have in mind not only a negative view of how globalisation regulates teachers' autonomy and professionalism in terms of telling teachers what they should be and do. Rather, I argue that globalisation also communicates opportunities for different thinking regarding discourses under study. For instance, I argue that globalisation also open new prospects for teachers to be in control of their own teaching practices, thus contributing to innovative thinking regarding teachers' autonomy and professionalism. My argument is supported by the notion that globalisation emphasises the development of a new information technology (Mundy, 2005: 4). These words of Mundy (2005) confirm globalisation's aim that there should be a move within the knowledge structure of a person to break down existing knowledge structures in order to come to innovative understandings of discourse.

Considering the above delineation, my view is that globalisation requires a critical reading of existing knowledge regarding teacher autonomy and professionalism. This is in line with my

endeavour to analyse South African education policy texts to explore innovative perspectives of the discourses under study. Like in any education policy, discursive practices (text, language and discourse) in South African education policy open doors for a restructuring, redistribution and disruption of power relations so that people (teachers) can and cannot do different things (Ball, 1993a: 13). Thus, discursive practices are forms of social practices, subject to particular rules through which particular representations of individuals are constructed within particular power relations (Foucault, 1976: 26). In education, discursive practices are articulated in policy texts and require an understanding of how it operates in the context of globalisation. Therefore, I argue that a close scrutiny is necessary to explore how educational policy in a globalised context performs the role of regulator, enabler and facilitator of educational change and the reconstruction of teacher roles. Such scrutiny is necessary because globalisation works both for and through education policy as a mechanism by which global forces affect the daily lives of teachers (Tikly, 2001: 155).

To conduct a scrutiny as indicated above, I shall start with an explication on globalisation and education policy.

3.3 GLOBALISATION AND EDUCATION POLICY

The increasing availability of international and comparative educational information about how schools work and perform in many different nations had a profound effect on education policy around the world. It has intensified a policymaking environment marked by extensive policy borrowing from one nation to the next by raising the stakes for educational production and nation-state building (Wiseman & Baker, 2005: 1). Policy borrowing involves the appropriation of identifiable aspects of another country's policy solutions, including ways of implementing and administering such solutions (Halpin & Troyana, 1995: 303). As a consequence, policy borrowing changes the way education policy is organised and delivered in nations, as well as what it means to be educated and learned across countries. Eventually, as international ideas and concepts enter national policy documents, they become legitimate elements in global educational paradigms associated with education policy (Wiseman & Baker, 2005: 5).

It is clear to me that globalisation challenges education policy makers to enter a complex debate about new kinds of policy action and political choice emerging from the

deterritorialisation of almost every domain of human endeavour, including our systems of knowledge and learning. Yet, policy makers, researchers and analysts tend typically and perhaps inevitably to reduce complex societal changes to a simple set of actionable policy problems in their own domain (Mundy, 2005: 7). However, albeit the uniqueness of every education policy, there is a clear and visible set of influences behind global educational reforms that constitute a common trend which cannot be ignored.

Ball (1998) argues that the influence of globalisation with respect to education policy can be made nameable and describable. First, *neoliberalism*, which sets the spontaneous and unplanned but innovative responses of the market form over the inefficient bureaucracy of planned change (Ball, 1998: 122). This has been of particular importance in the United Kingdom education reforms which provided a test-bed to which other governments at least attended when contemplating their own reforms. Second, *new institutional economics*, which sought to explain the workings of social life, the construction of relationships as well as co-ordination of individual and collective behaviour (Ball, 1998: 122). This involves the use of a combination of devolution, targets and incentives to bring about institutional redesign. In education the impact of such ideas is evident in the myriad of site-based management initiatives in terms of self-managing schools and school improvement. A third influence, which interweaves with both of the preceding, is called *performativity* (Ball, 1998: 122-123). Performativity is a principal of governance which establishes strictly functional relations between a state and its inside and outside environments (Yeatman, 1994: 111). As part of educational transformation, performativity provides sign systems which represent education in a self-referential and reified form of consumption. Many of the specific technologies of performativity in education like total quality management and human resource management, amongst others are borrowed from commercial settings. Fourthly, *managerialism* is considered both a delivery system and a vehicle for change (Ball, 1998: 123). In the educational sector the education manager is the main carrier and embodiment of new managerialism and is crucial to the organisational regimes of the school.

In view of the prior influences as articulated by Ball (1998), I detect some degree of concomitance between globalisation and education policy. For me, the manifestation of globalisation in education policies emerge in terms of value systems, symbolic systems, accounting for and legitimating political decisions. It is almost as if education policies in a globalised context are articulated in a particular way so as to achieve measurable effects and

to manufacture support for those effects. If education policy in a globalised context comprises of measurable effects, I consider the meaning thereof in terms of Hartshorne (1999) who asserts that: “*education policy is a course of action adopted by government, through legislation, ordinances, and regulations, and pursued through administration and control, finance and inspection*” (Hartshorne, 1999: 5). Thus, education policy is filled with texts that not only define what can be said and thought, but also who can speak where, when and with what authority. Because education policy texts are construed as indicated in the prior view, expressions; information; ideas and intentions become discursive practices that regulate the function of schools and ultimately the educational practices of teachers. It informs the function and actions of teachers and if this happens, teachers, their autonomy as well as professionalism are reassembled and re-territorialised within global education systems (Vongalis, 2003: 124).

Teachers, according to Ball (1993: 108) become an absent presence in the discourses of education policy. Within Ball’s (1993) view I become cognisant of how education policy regulates teachers with regard to who are entitled to speak and what actions should be performed. As a consequence, teachers lose their autonomy under a totalising form of control that derives from the way discourse is presented in education policy (Ball, 1993b: 128). Also, performance regulations with embedded hierarchical relations of authority in education policy, interferes with professionalism. Its interference is based on guideline and standards that direct the action of educational institutions towards the future (Rupérez, 2003: 254). I want to provide an example in terms of the prior standpoint: education policies in a globalised context introduce reforms in curriculum, pedagogy and evaluation. Such reforms can be witnessed in international comparisons of test performance, methods of assessment, teacher training as well as an increase in productivity and creativity. If globalisation functions as has been articulated in the afore-mentioned views, I am granted an opportunity to once more construct another meaning of globalisation.

I am of opinion that globalisation is regulative, because it brings with it measures of control and authority, but also opportunities to think differently regarding discourse in education policy. Because of its regulative nature, the presence of globalisation in education policy compels us to oppose objective realities and so-called true meanings of discourses like teacher autonomy and professionalism.

I contend that the prior views set the context for exploring how teacher autonomy and professionalism are articulated in South African education policy in a globalised context (*supra*: Chapter 4). However, before probing South African education policy in a globalised context, I cannot resist but to first look over the ocean to explore how teacher autonomy and professionalism are regulated by education policies in different parts of the world. As a result, I intend to probe international research to comprehend how the discourses under study are affected in some Western and African countries with respect to the influence of globalisation on education policy.

The exploration I have mentioned above will take place in two stages. I shall start with an exploration of globalisation and education policy in Western countries followed by an analysis of globalisation and education policy in African countries.

3.3.1 Globalisation and education policy: Western countries

The role of globalisation and its influence on policy-making in Western countries had a significant impact on education policies and directives for teacher education. According to Vongalis-Macrow (2007: 426) entities like the *Organisation for Economic Co-operation and Development* (OECD) as well as the *World Bank* played a significant role in the articulation of education policy stipulations relating to teachers.

Education policies drafted by the afore-mentioned entities put globalisation in the forefront regarding the transformation of teachers' working life (professionalism) and autonomy. In this regard some countries like Mexico, Argentina, Australia and China seem to have experienced similar effects of globalisation on education policy. It is my intention to explore some policy stipulations by the OECD to grasp how teacher autonomy is articulated in these countries which will be considered a sample population of education systems in the Western world.

With respect to teacher autonomy, OECD education policy emphasises that:

“Teacher development has to be part of a wider programme of change, that gives clear authority for schools to do things in new ways, and enables teachers to widen their perspectives to see beyond the influences that have

traditionally shaped their behaviour” (Centre for Educational Research and Innovation, 1998: 498-501).

For me, this stipulation attests that teachers are not only important educational agents in the classroom, but that they also have a social obligation to contribute the world as workers and educators. However, the preceding social obligation of teachers is diminished in the current global climate in the sense that:

“We must rethink not only past practices and what goes under the name of professionalism, but also the very imagination it will take to exceed compliance, fear controversy and unclaimed experiences” (Britzman, 2000: 204).

Interpreting Britzman (2000), I hold the view that global policy guidelines downplay western teachers’ social relevancy. In this instance, it appears as if teachers are constructed as uncomplicated professionals that can be repositioned and regulated to do things differently within a changing educational landscape. The impression I get is that teachers’ autonomy is depleted, because teachers are forced to disengage from educational acts (their professional obligations). The implication of the latter, I argue, is that teachers’ autonomy may be rendered under-utilised.

Apart from under-utilisation, teacher autonomy is further dwindled, because teachers’ responsibilities are controlled by stringent government regulations which are directed towards the delivery of education as a service for students. Teachers are seemingly held accountable for the improvement of student performance and to ensure this, OECD policy stipulates that:

“As governments look for a closer relationship between investment in teachers and outcomes for students, the pressure for evaluation is growing”
(Centre for Educational Research and Innovation, 1998: 313-314).

This policy statement adds to more accountability and regulatory tasks which strengthen the reduction of teacher autonomy, because teachers respond more to achieving set outcomes than taking any risks to improve student performance (Sahlberg, 2007: 151 and Vongalis, 2003: 4).

My analysis of the prior excerpts can be considered indications of how teacher autonomy and professionalism are reconfigured by OECD policy in Western countries. Such reconfiguration creates teachers who are responsive to requirements and specific targets articulated in education policy. Ball (1999) explains that:

“The global trends of school improvement and effectiveness, performativity and management are working together to eliminate emotion and desire from teaching – rendering the teachers’ souls transparent but empty” (Ball, 1999b: 26).

The proliferation of rules and regulations in education policy as indicated by Ball (1999) suggest a commodification of teachers’ autonomy and professionalism. This occurs because education policy in Western countries seemingly treats teachers like updated, contoured and remodelled products who have to adhere to the demands of globalisation (Vongalis-Macrow, 2007: 436).

In view of the analysis in this section I am of opinion that globalised education policies, as disseminated by the *OECD* and the *World Bank*, not only put forward education policies that regulate teacher autonomy and professionalism in Western countries alone. The *World Bank Working Paper No. 127* reports that education and teachers’ work in African countries are also influenced by global demands such as knowledge, skills and competencies (*World Bank*, 2008: xii). Subsequently, in the next section I shall explore how teacher autonomy and professionalism in African countries are regulated by globalisation.

3.3.2 Globalisation and education policy: African countries

Education in African countries has been subjected to innumerable reforms that change the structure and function of schools and teachers. Changes in the economy (reduction of public investment and increase in privatisation), politics (deregulation of the role of the state) and education (a push for accountability and standardisation) challenge the role and structure of education (Naidoo, 2002: 3). A central challenge revolved around the impact of education systems on teaching practices and autonomy in countries like Malawi, Papua New Guinea, Zambia, Namibia, Ghana and Nigeria, amongst others (Johnson, 2008: 144).

Albeit influences of globalisation on education in African countries, I found that no specific research relating to education policy analysis on teacher autonomy and professionalism has been conducted. This is confirmed by an extensive search I conducted to find information on “how teacher autonomy and professionalism are articulated in education policies of African countries in the context of globalisation” (ERIC, SAePublications, Academic Search, AfricaWide and Sabinet). To strengthen my search, I consulted academic articles, books, university libraries as well as the internet to explore the influence of globalisation on teacher autonomy and professionalism in African countries.

I want to indicate that it is not possible to explore research done in all African countries. Harvey (1990: 29) notes that where there may be a large list of concepts in practice, it is not necessary to attempt an analysis of each. Taking my cue from Harvey (1990), I argue that there are too many African countries and that the scope of this dissertation makes it impossible to conduct an exploration relating to all of them in this section. Research conducted indicates that the influence of globalisation on teacher development seems to be similar in most of the African countries (Hennesy, Harrison, Wamakote, Roberston, Novelli, Dude, Tikly, Dachi, Alphonse, Ogawa, Sifuna, Kunje, Ampiah, Byamugisha, Swamura and Yamada, amongst others). Therefore, I consider Malawi, Papua New Guinea, Zambia, Namibia, Ghana and Nigeria a valid sample population representing African countries in this section. I shall now perform an analysis to grasp how teacher autonomy and professionalism in globalised times are articulated in education policy of the mentioned African countries.

In view of teacher autonomy and professionalism, Bennell (2004) reports that:

“The excessive politicisation of public education has had a profound impact on levels of accountability” (Bennell, 2004: iv).

Accountability redefines the nature of teaching: “where commitment, judgement and authenticity within practice are sacrifices for impression and performance” (Ball, 2003: 211). This view portrays African teachers as compliant educationists whose practices are undermined and their agency mistrusted. The issue here, according to Ball (2003: 222) is the inauthenticity and meaninglessness of teaching within standardised boundaries where teachers are not encouraged to have a rationale for practice. I argue that, if this happens,

teacher autonomy is reduced, whilst professionalism is regulated by accountability which may produce undue pressure; generate a sense of anxiety and fear as well as undermining teachers' confidence in their own capacities. It seems as if teacher autonomy and professionalism weaken due to efforts devoted to regulating teachers to fit the rigours of performance in education systems in African countries.

Closely tied to the diminishing on teacher autonomy and professionalism, African education systems aim to:

“Provide teachers with the intellectual and professional background adequate for their assignment and make them adaptable to changing situations; and enhance teachers' commitment to the teaching profession”
(E9report, 2008: Chapter 2).

This stipulation attracts the notion that African education systems intend to contour and construct teachers in ways that have profound consequences for teacher practices and autonomy (Luke & Luke, 2001: 9). For me, it seems as if teachers' professionalism is largely defined through standards responsive to the objectives of education systems. In this sense, I am of opinion that the use of *“provide teachers”*, *“make them”* and *“enhance teachers”* are problematic. My viewpoint is that if teachers are to understand policy phrases as indicated in the prior view, they may suspect that, rather than having their autonomy enhanced, they might be regulated by stringent and covert measures of control. As such, teacher autonomy may be diminished by imposed education policies and procedures that determine what African teachers should do.

The tight procedures implemented to control teachers in African countries are further emphasised in the Malawian *National Education Sector Plan* (2008) which stipulates that it is necessary to:

“Reinforce inspection and supervision system of primary education”
(Ministry of Education, 2008: Section 4.1.3(iv)).

I interpret *“inspection”* and *“supervision”* as coercive policy forces which impose compliance to rules, regulations and norms that can be considered as authoritarian, rigid, ritualistic and

legalistic. The implication is that prescribed inspectorate formats are implemented which result in decisive control that is exerted over teachers by inspectors and supervisors. When control is rigorously employed over teacher like I explained in the preceding arguments, *performativity* is brought into the educational arena. Performativity relates to: “the ideology and efficient practices of those institutions where goals are set in ever narrowing demands and where accountability is measured by outputs” (Marshall, 1999: 310). In this instance, performativity requires teachers of a certain kind – not autonomous persons, but governable professionals who become produced and constraint subjects of the African education system.

Thus, although education systems in African countries portray teachers as governed professionals, it vaguely appears as if teachers are allowed some kind of freedom regarding their educational responsibilities. For instance, the Ghanaian Ministry of education proclaims that:

“The Ministry provides relevant policies, guidance and support to agencies and to schools and teachers, with schools taking greater responsibility for their own improvement and school staff working with local communities towards a common goal” (Ministry of Education, 2003: Section 2.2.3).

I argue that whilst “*taking greater responsibility for their own improvement*” seemingly renders schools and subsequently teachers autonomous, the Ghanaian Ministry, however, is not specific as to what extent teachers have autonomy to work with local communities towards a common goal. I notice that the same document also does not explain what common goal teachers should work towards. Though the language in the document seemingly brings the notion of freedom to the surface, I suspect that teachers’ autonomy are still limited by policy regulations, guiding strategies and support mechanisms. While launching a more thorough investigation into the Ghanaian Education document, my suspicion was confirmed by the use of the phrase: “*The Ministry shall provide*” throughout the document (Ministry of Education, 2003: Chapter 1-5). Therefore, I argue that “*The Ministry provides policies, guidance and support*”, as mechanisms of control, contradicts “*taking responsibility*” as a characteristic of teacher autonomy. I speculate that teachers are granted little or no autonomy. Thus, whilst teachers seemingly have the freedom to collaborate with the community, their autonomy is simultaneously diminished by policy regulations.

The analyses I conducted in this section thus far reveals that education policy in global times plays a significant role in regulating teacher autonomy and professionalism in both Western and African countries. Both the analyses on policy stipulations and academic literature pertaining to Western- and African countries indicate that teacher autonomy and professionalism are mainly regulated by *managerialism*, because actions of management are instigated by “*the government*”, “*the ministry*” “*policy*” or “*the education system*”.

Managerialism, rejecting the primacy of the professional, imposes a range of subjectivities that encourage individuals to behave in the best interest of the organisation (Kolsaker, 2008: 514). For academics, like teachers, this implies less freedom and autonomy, while it at the same time signifies a more structured, monitored and managed regime. To illustrate the prior view, I shall now analyse a stipulation from each of the Western and African countries to show why teacher autonomy and professionalism are mainly regulated by managerialism:

| Western Countries | African Countries |
|---|---|
| <p><i>“Teacher development has to be part of a wider programme of change, that gives clear authority for schools to do things in new ways, and enables teachers to widen their perspectives to see beyond the influences that have traditionally shaped their behaviour”</i> (Centre for Educational Research and Innovation, 1998: 498-501).</p> | <p><i>“The Ministry provides relevant policies, guidance and support to agencies and to schools and teachers, with schools taking greater responsibility for their own improvement and school staff working with local communities towards a common goal”</i> (Ministry of Education, 2003: Section 2.2.3).</p> |

From the stipulations above, it is evident to me that power operates through attraction and persuasion rather than coercion. According to Davies (2003: 91), the dispersal of power places emphasis on responsibility and autonomy. However, I argue that it is not responsibility founded on trust, because it is eroded by checks of audit and accountability found in “*be part of a wider programme*” and “*relevant policies, guidance and support*”. The latter is also an encroachment on teachers’ autonomy, because teachers are subjected to a circumscribed form of autonomy. Firstly, required outcomes are specified: “*enables teachers to widen their perspectives*” and “*working towards a common goal*”. Secondly, mechanisms like “*programmes*” and “*policies*” are used to ensure that outcomes are met. As such, the

stipulations represent the policies' expectations for schools, whilst teachers' autonomy and professionalism are covertly weakened (Levay & Waks, 2009: 209-211).

In this section I provided a brief overview of the relationship between globalisation and education policy in general (*infra*: 3.3). I argued that globalisation re-configures policy texts in such a way that words and thoughts presuppose a different theory of language. Globalisation thus requires a different thinking regarding meanings that lie covert beneath policy discourse. To confirm this I decoded discourse relating to education policies of Western countries (*infra*: 3.3.1). My analysis highlighted that teacher autonomy and professionalism are depleted due to global demands such as knowledge, skills and competencies. I then piloted an analysis on how teacher autonomy and professionalism are regulated in education systems in African countries (*infra*: 3.3.2). My analysis indicated that, although teachers in African countries are seemingly allowed autonomy, their teaching practices are regulated in terms of performance, governance and managerial structures.

After the analyses on both education policy in both Western and African countries, I ask myself the question: what constitutes globalisation in terms of policy studies in the aforementioned countries? Emergent from my analyses in this section, I am of opinion that:

“Globalisation, directed at enumerating various levels of different perspectives of discourse, sets in motion a constant questioning of existing meanings regarding governance, management and performance in education policies (my own articulation).”

My conceptualisation of globalisation here signifies tight regulation of teacher autonomy and professionalism in Western and African countries. For me, it is almost as if there is no way that teachers in the mentioned countries could achieve educational goals if such goals are not regulated by an order of globalisation.

Like many educational systems around the world (for instance: Western and African countries), South African education policies have also been redesigned in terms of knowledge, skills and competencies required to adhere to the challenges of globalisation. As such, in the next section I intend to explore the role of globalisation in and its effects on South African education policies.

3.3.3 Globalisation and South African education policy

While political change in South Africa resulted in the development of new education policies, such developments can be linked to globalisation.

In South Africa, the last decade of the 20th century will probably always be associated with this country's first national democratic elections. It was during this decade that South Africa's massive national project was born. Not only did this project aim at restructuring the nation and education in the context of apartheid, but also to address challenges of the global era. The dual task of the transformation project was to reconcile the afore-mentioned challenges which are articulated as:

“the post-apartheid challenge: the democratic project of overcoming the devastating legacy of apartheid to ensure that South Africans have the knowledge, values, skills, creativity, and critical thinking required to build democracy, equity, cultural pride and social justice” (Department of Education, 2000a: Section 1.3); and

“the global competitive challenge: to establish a system of lifelong learning that will develop the knowledge, skills and competencies required to facilitate innovation, social development and economic growth in the 21st century” (Department of Education, 2000a: Section 1.3).

For me, the above stipulations are an indication that the restructuring of South African education has been complex in the sense that changes to the education system in response of globalisation occurred at the same time as the advent of a new democratic dispensation. Critical in playing a vital role to educational change amidst globalisation one finds education policy which acts as regulator, enabler and facilitator regarding how educational processes should be conducted (Mok, 2005: 292). My observation, in terms of Mok's view, is that education policy holds power structures embedded in discourse which set the terrain of politics in terms of what can and cannot be said, thought and reacted to. In this instance, power structures in policy can be understood as a network of powers, diffused and permeating in various policy processes, which ensures different forms of domination (De Clercq, 2010: 93). Therefore, I contend that South African education policy is firmly grounded in a global agenda.

In response to the afore-going discussion, teachers are ushered into an era of control where new ways are sought to fit teachers into a wider educational landscape (Vongalis, 2004: 489). I consider this view as a confirmation that globalisation has profound influences on South African education policy development. Such confirmation is based on the notion that: “*South Africa adopts policies, very much in line with the neoliberal dictates of the present forces of globalisation, suggesting its willingness to conform to the current global order*” (Schneider & Steyn, 2001: 723-731). Globalisation therefore works both on and through education policy. This implies that not only is education policy affected by globalisation, but it also becomes a principle mechanism by which global forces regulate the educational practices of teachers (Tikly, 2001: 155). Regulation depicted in South African education policy represents the flows and networks of activity, interaction and the exercise of power due to the impact of globalisation. Held, McGrew, Goldblatt & Perraton (1999: 16) explains that “*flows*” refer to movements of information in policy discourse, whilst “*networks*” is used to refer to regularised interactions between nodes of activity or sites of power relating to globalisation and educational agents (teachers).

Within the framework of the preceding discussion, the role of consultants from Australia, the United Kingdom, United States of America, is an amalgam of policy initiatives amidst South African education policy reform in line with globalisation (Jansen, 1999: 44). Therefore, I deem it necessary to provide examples of how South African education policies have been reformed in the context of globalisation. *Outcomes-Based Education* (OBE) takes its cue from early competency debates in Australia, whilst the work of William Spady is equally regarded significant in the draft of OBE (Department of Education, 1997b). Proponents of OBE in South Africa and internationally have claimed for it the capacity to meet the needs of “*all students regardless of their environment, ethnicity, economic status or disabling condition*” (Soudien & Baxen, 1997: 450). On the other hand, the *National Qualifications Framework* (NQF) (Department of Education, 1997b) relies heavily on New Zealand education policy and to a lesser extent, on variants of this model from Scotland and parts of the United Kingdom. The NQF is a coordinating structure and mechanism set up to regulate the highly fragmented education system and training in South Africa. Its primary objectives are to create an integrated national framework for learner achievement and to enhance access to, and mobility and quality within, education and training (Department of Education, 1997b: 14).

In his analysis of the *South African Qualification Authority* (2002), French (2009) distinguishes between three networks of power that can be traced in South African education policy in global times: *the exercise of power*, *the play of power* and *power-play* (French, 2009: 28). Whilst *the exercise of power* has reference to political and educational structures which exerts control by means of policy, *the play of power* refers to how teachers' educational practices are regulated by a multitude of tangible and hidden mechanisms in policy. On the other hand, *power-play* works as actions which enable policy agency within a specific social domain like education. (French, 2009: 28).

Considering the afore-mentioned examples, I argue that is critical to engage with South African education policy to explore the influence thereof on teachers and the work they do. Significant to teachers' work, the implementation of education policy in a globalised context holds implications for teacher autonomy and professionalism, because: "*the aim of policy to equip teachers to understand their demanding tasks, to enable them to continually enhance their professional competence*" (Department of Education, 2006: Section 1). Here, I interpret "*equip teachers*" and "*enable them to continually enhance their professional competence*" as apparatuses of the South African education department to regulate teachers' educational practices and choices by means of education policy directives. I contend that such directives have relevance to the influence of globalisation on South African education policy. Therefore, globalisation in terms of this study can be articulated as:

"A process where regularities in education policy orders us to ask questions about meanings of discourse that we have not thought about before and subsequently assist us to consider multiple meanings of texts in education policy" (my own articulation).

By describing globalisation in this way, I contend that it opens up dialogue to explore how teacher autonomy and professionalism are articulated by South African education policy. Thus, to open up such dialogue, I shall scrutinise South African education policy to search for regularities which will be used as frames of analysis to later (Chapter 4) explore innovative perspectives on teacher autonomy and professionalism. Before a search of this kind will be undertaken, I shall first provide an overview of the concept "regularities" and how it will be applied in this study.

3.4 REGULARITIES: A GESTALT

In the context of this study, I shall briefly give an overview of Foucault's early works to explicate regularities. As part of this explication, I shall provide examples of how regularities have been utilised to analyse texts, while I also intend to later explain how regularities will be used to analyse South African education policies to conduct a policy archaeology.

Where Foucault uncovered the origination of specific concepts in previous archaeological works, for example the concepts of madness and disease, he shifts his attention to larger archaeological structures that constitute the knowledge infrastructure of a given time in period and which constitute its discursive regularities (Foucault, 1972: 191). Foucault believes that there is much more to the regularity of discursive practices that can be seen by simply reading texts. Significant to me, Foucault postulates that regularities, which he refers to as rules of formation (or rules of order) should be mapped to investigate what meanings they intend to create or limit in statements or texts (also education policy texts). Thus, to analyse education policy texts, Foucault asserts that: "*the tranquillity with which they are accepted must be disturbed; we must show that they do not come about of themselves, but are always the result of a construction of rules of which must be known, and the justifications of which must be scrutinised*" (Foucault, 1972: 25). I take this to mean that regularities contribute to disturbing singular meanings locked in education policy texts with the intention to inform the emergence of multiple meanings of discourse under study.

Drawn from his intersections with the works of Foucault (1972, 1973, 1979 & 1988), James J Scheurich has developed *policy archaeology* as a research method in the postmodern. In Chapter 1 (*infra*: 1.7.2), I have indicated that policy archaeology aims to uncover rules of formation (regularities). It searches for regularities that explain the appearance of discourse under study (Foucault, 1972: 38, 107 & 117). As a reminder (*infra*: Chapter 1), regularities are not intentional (Scheurich, 1997: 99-100). Rather, regularities are productive and reproductive in the sense that it constitutes categories of thought and ways of thinking about discourse under study. Regularities can therefore be considered to be fundamental codes which construct the *episteme* or configuration of knowledge that determines the orders and social practices of a particular era (Scheurich, 1997: 100). As a consequence, regularities can be identified, but are not the same throughout all time (Scheurich, 1997: 101) and can be recognised within the context of human activity, but are not necessarily within the awareness

of social agents (Scheurich, 1997: 101). In my view, regularities constitute frames of thinking with which to articulate and consider alternative perspective of teacher autonomy and professionalism. For me, this confirms the use of postmodern deconstruction as my research methodology and policy archaeology as my research method. Both my research methodology as well as research method represent approaches in understanding how innovative perspectives regarding discourse can be labelled, made nameable and describable. To exemplify the use of regularities, I shall briefly refer to international studies where regularities have been used to analyse texts.

Example 1: In his book, *Research Method in the Postmodern* (1997), Scheurich identified five regularities to examine the emergence of problems relating to failing school children. The identified regularities have been labelled as gender; race; class; governmentality and professionalization (Scheurich, 1997: 103). In his study, the regularities of race, class and gender are deemed important to the social construction of the problem group (lower-class children, children of colour and children from female head-of-household families). The regularities of governmentality and professionalization according to Scheurich (1997) are critical to the naming, describing and treating of the problem and the problem group. The interaction of the five regularities constitutes the problem, the problem group and the policy solution in line with failing school children. As a result, Scheurich describes the application of the afore-mentioned regularities as both epistemological and ontological, because it constitutes both who the problem group is and how the group is seen or known as a problem (Scheurich, 1997: 107).

Example 2: In her doctoral dissertation in 2002, Heywood identified *ecological governmentality* as regularity of biotechnology. She explored the grid of discourse relations that inform the emergence of international consensus on biosafety which defines the policy problem as a government failure to act (Heywood, 2002: 88). Following from her research it is evident that policy solutions pertaining to the policy problem were at variance to the regularity, because the grid of regularities prevented the gaze of government apparatus falling on such solutions (Heywood, 2002: 250).

Example 3: In 2011, Errat undertook a study: “to research policy from process and product frames, examining the social and cultural regularities that led to the naming of education of children with disabilities as a social problem and the subsequent selection of a policy

solution, a solution influenced by these same regularities” (Errat, 2011: 11). The regularities referred to has been named “education is a human right” and “education support social development”. In his conclusion Erratt indicated that the first regularity emphasises that special efforts must be taken to ensure access to education for people with disabilities. The second regularity dealt with poverty and political as well as economic marginalisation experienced by the majority of people with disabilities. The argument emerging from Errat’s study (Errat, 2011: 20) is that through education, people with disabilities could access jobs and move from being dependent on the state to included members of society.

The afore-going examples are but a few illustrating the application of regularities as frames of analysis, because the scope of this dissertation does not allow me to provide an overview of all studies conducted in this manner. Interestingly, however, I noticed how each author apply different regularities to interpret texts. This echoes Foucault’s view that regularities can be utilised differently and that there are no absolute ways in applying them (Scheurich, 1997: 101). Thus, albeit different applications of regularities, I articulate regularities in terms of this study as:

“Rules of discursive formation that constitute systems of thought to explore innovative perspectives about discourse in education policy” (my own articulation).

Therefore, in this study the above articulation will be used to search for regularities in South African education policies to explore innovative perspectives regarding teacher autonomy and professionalism. These policies are: *Norms and Standards for Educators (2000)*, *National Framework for Teacher Education, Development in South Africa (2006)* and *Continuing Professional Teacher Development (CPTD) System (2008)*. Although a compendium of education policies is available in the South Africa education system, it is impossible to analyse them all. The mentioned education policy documents were chosen, because they provide a proximate picture of educational development in South Africa and are undoubtedly informative with respect to teacher roles, autonomy and professionalism, amongst others (*infra*: 1.8). The uncovering of regularities will be twofold: (i) the discursive practices in South African education policies will be identified; and (ii) the regularities will be labelled, made nameable and describable (*vide*: Scheurich, 1997).

Since I have just explicated how regularities will be used in this study, that is, to explore innovative perspectives regarding teacher autonomy and professionalism in South African education policies, I regard it necessary to pay attention to education policy as discursive embodiment. My reason is that education policy documents are discursive embodiments as it underlies social relations at particular points in time (*vide*: Olssen *et al.*, 2004: 1).

3.4.1 Education policy as discursive embodiment

Education policy is not just a matter of understanding its educational context or reading it as the pronouncement of policy-makers. Meanings embedded in education policy texts await decoding so as to construct and reconstruct meaning of discourse under study. Therefore, in this section I intend to explicate education policy as discursive embodiment in preparation to later probe regularities in South African education policy.

Education policy, as text and as discourse perspectives, is physical codes that carry meanings representative of the struggle and conflict of their production (Ball, 1994: 18-20). According to Ball (1994), once meanings are captured in policy documents they become the focus of secondary adjustment, meaning that they are open to interpretation and re-interpretation. I contend that education policy texts are the central points of interaction policy production and the politics of policy interpretation, because policy texts are political acts or textual interventions put into practice. Henry (1993: 102) confirms my contention when he indicates that: “*policy as text involves the agency side of work*” most probably located within the context of educational practices (*also*: Gale, 2006: 394). It appears to me that an understanding of education policy texts requires a consideration of text and action, words and deeds as well as discourse of policy text as enactment and what is intended with such discourse.

Gale (2006: 395) alerts us that within Ball’s (1994) heurism, policy text is complemented by an understanding of policy as discourse, primarily to account for the politics of policy text production: “*what can be said, and thought, but also who can speak, where and with what authority*” (Ball, 1994: 21). I am convinced that the latter provides reason why Foucault (1984) proposes that:

“Discourse is not simply that which translates struggles or systems of determination, but is the thing which, and by which, there is struggle, discourse is the power which is to be seized” (Foucault, 1984b: 110); while

Lewis & Simon (1984) as well as Gale (2006) posit that:

“Discourse refers to particular ways of organising meaning-making processes. Discourse as a mode of governance delimits the range of possible practices under its authority and organises the articulation of these practices within time and space although differently and often unequally for different people. Such governance delimits fields of relevance and definitions to legitimate perspectives and fixes norms for concept elaboration” (Lewis & Simon, 1986: 457-458 and Gale, 2006: 396).

There is, in my opinion, within the latter authors’ views an indication that education policy discourse is interactive practices which involves thought, invention and space for the construction of innovative perspectives. This is confirmed by the notion that: *“discourse is the power which is to be seized”* (ibid.) and *“relevance and definitions to legitimate perspectives and fixes norms for concept elaboration”* (Lewis *et al.*, 1984 and Gale, 2006). It appears to me that discourse in education indeed contains discursive formations which enable the analyst to decipher the meanings of texts in education policy so that the construction of innovative perspectives is made possible. This complements the idea of applying deconstructive interrogation to question grand narratives about the meaning of discourse under study (Noar, 2008: iv). Therefore, I argue that to make use of deconstruction to explore multiple perspectives about discourse, one should have knowledge regarding discursive formations. After all, discursive formations provide guidance as to how to label regularities in education policy. As such, knowledge about discursive formations is important, because discourse by its very own nature is vulnerable to a magnitude of meaning (Lather, 2006: 38).

Subsequently, an explication of *discursive formation* follows.

3.4.1.1 The discursive formation

In his book, *The Archaeology of Knowledge*, Michel Foucault devoted extensive attention to a discussion on *discursive formation*, because it makes it possible to label regularities that inform the position of people within them (Foucault, 1972: 38). Considering Foucault's view, my focus in this section is on the importance of the *discursive formation*, because it may open possibilities to explore how regularities (to conduct a policy archaeology) can be labelled, made nameable and describable so as to explore how teacher autonomy and professionalism are articulated in South African education policies.

Discourse, in the sense of Foucault, embodies sets of statements that form objects, concepts, subjects and strategies which are governed by analysable rules and transformations (Foucault, 1972: 211). Such rules constitute systems of thought that determine what could be said, who could speak, the position from which they could speak, the viewpoints that could be presented and the interests that are represented. I would like to indicate that the rules, which Foucault is talking about here, may be referred to as rules which determine the *discursive formation*. A *discursive formation* denotes to the way in which a collection of texts are organised with respect to each other (Foucault, 1972: 38 and Radford, Radford & Lingel, 2012: 257). Radford *et al.* (2012) compares the description of a discursive formation with books arranged on the shelf of an academic library which has been placed in a particular order. For instance, an academic librarian might explain that books are arranged according to the proximity of their subject matter. In the *Library of Congress* classification scheme, books about language and literature are catalogued under the letter *P*, philosophy under *BS* and science under *Q*, amongst others. Similarly, book collections in public and school libraries are organised within schedules of the *Dewey decimal classification* system (Radford *et al.*, 2012: 257). The idea of a *discursive formation* embodies the same principle as the arrangement of books on a shelf. For me, this comparison foregrounds Foucault's contention that discursive formations are real, that is, they can be seen and experienced.

However, discursive formations are different from ordinary discourses in that they are located within institutions that regulate or control individuals (Olssen, 1999: 23). If related to my teaching experience, I take this to mean that discursive formations assist in regulating teachers' practices and how they are positioned in educational settings. Thus, borrowing

from Foucault, I propose that the uncovering of discursive formations in this dissertation will unfold as follows:

Phase 1: Stipulations from the three mentioned South African education policies will be utilised for analysis. Statements from stipulations will be extracted to interpret the potential meanings they may bring to the fore;

Phase 2: An archaeological explanation follows. This kind of description aims at uncovering the interplay of similarities and differences as they appear on the level of the rules of formation (Foucault, 1972: 165). Here, *who or what* is made dominant or subordinate in South African education policies is exposed and relations of power are revealed; and

Phase 3: The act of regularity is identified, is made nameable and describable. In doing so, I intend to use the labelled regularities to analyse South African education policy discourses to explore innovative perspectives on teacher autonomy and professionalism.

In this section it becomes manifest that discursive formations act as legitimate objects of inquiry. In this instance: “*it is about how texts are made meaningful through the process of their production and how they contribute to the constitution of social reality by making meaning*” (Phillips & Hardy, 2002: 4). Thus, while discursive formations are identified and subjected to analysis, their similarities and differences are made manifest. This confirms why policy archaeology is a study of plurality. Consequently, I, as policy archaeologist, shall search for the rules of discursive formations which contribute to the emergence of regularities that may be used to analyse discourse under study.

Considering the afore-going explication, it is logical that my next endeavour would be to provide an explication as to how I intend to identify regularities in preparation for a policy archaeology of South African education policies in Chapter 4.

3.4.1.2 Identifying regularities

In the previous section I indicated that, to label regularities, one needs to scrutinise education policy discourse to disclose discursive formations. In this section, my aim is to “*make known things said*” (Foucault, 1972: 50) in South African education policy texts as a way to move

towards the labelling of regularities. My point is that discourses carry messages which, after analysis, act as basic units of a discursive formation and which are referred to as *regularities*.

In the words of Foucault: “A *discursive formation comprises the regularity that obtains between objects, types of statements, concepts or thematic choices*” (Foucault, 1972: 38 & 107). I am aware that one has to conduct proper analysis to find regularities, because it cannot be pre-determined. It changes and disappears whilst new ones frequently emerge, because regularities are particular to certain time periods (Scheurich, 1997: 100-101).

Between the cited authors (Scheurich and Foucault) above, I choose to draw on Scheurich’s notion that regularities change over periods of time, whilst new ones frequently emerge. My choice resonates with the argument that South African education policy amidst globalisation requires that one has to find a different tone, a different way of looking, a different way of speaking and a different way of thinking about teacher autonomy and professionalism. This means that I am positioned to open myself to be critical of how regularities in South African education policy documents are construed as expressions of information, ideas and intentions about the discourses of teacher autonomy and professionalism (*infra*: 1.2). As such, South African education policies in a globalised context will be analysed to search for regularities to conduct a policy archaeology. In line with this study it is worth mentioning that regularities constitute policy archaeology and act as pre-conceptual frames to search for innovative perspectives regarding discourse under study. Therefore, my intention is to identify regularities, make them nameable and describable after which they will be applied to explore innovative perspectives in relation to teacher autonomy and professionalism in South African education policies.

3.5 PROBING REGULARITIES IN SOUTH AFRICAN EDUCATION POLICIES

From 1995, the SAdoE introduced many policies intended to bring a radical reconstruction of the education and training system in this country (Parker & Deacon, 2006: 6). To meet its statutory requirements as an employer, the SAdoE developed, amongst others, new *Norms and Standards for Educators (2000)* (hereafter: NSE), *National Policy Framework for Teacher Education (2006)* (hereafter: NPFTED) and *Continuing Professional Teacher Development (2008)* (hereafter: CPTD). Earlier I indicated that the afore-mentioned education policies provide a proximate picture of educational development in South Africa

and are undoubtedly informative with respect to teacher roles, autonomy and professionalism, amongst others (*vide*: 1.8). For instance, whilst the NSE intends to articulate and enhance teacher development, it also provides the education department with regulatory mechanism as part of a strategy for teacher development and accountability (Department of Education, 2000b: Section 1-3). Although the NPFTED apparently considers teachers as drivers of good quality education, it also regulates teachers' performance according to ethical and professional standards of conduct (Department of Education, 2006: Section 5-7). Furthermore, although the CPTD seemingly affords teachers freedom of choice regarding their own professional practices, such choice for improvement and development is defined by different educational stakeholders (Department of Education, 2008: Executive Summary). In my view, these policies embrace discourse relating to teacher autonomy as well as professionalism. Not only does it seem that teachers are afforded opportunities to act independently (autonomously), but it also appears that education policy is prescriptive regarding teachers' professional conduct (professionalism).

The preceding provides evidence of the manifestation of regularities in South African education policies. Consequently, in the following sections (*supra*: 3.5.1-3.5.3.4) I aim to explore and interpret regularities in the above-mentioned policies. The unpacking of regularities is geared towards archaeological thinking in preparation to later (Chapter 4) conduct a policy archaeology to search for innovative perspectives regarding teacher autonomy and professionalism in the above-mentioned three South African education policies. One stipulation from each of the three policies will be selected to search for regularities. Although all stipulations in these policies are grounded on a compendium of regulatory arrangements and legislative statements, a selection of individual stipulations will occur in view of pre-analyses I conducted.

Let me explain what I mean by my preceding statements. I conducted a pre-analysis of many stipulations in each of the three education policies before making my choice in terms of which ones to use in this section. I strengthened my pre-analysis by consulting the works of local authors like Jansen (1999) and Robinson (2003), amongst others to obtain an understanding as to how they determine teacher regulation in South African education policies. Taking my cue from the mentioned authors, I selected those stipulations for analysis which I was convinced could be considered strong representatives of the three South African education policies under scrutiny. The selected stipulations below can thus be considered

credible to be analysed in an attempt to search for regularities in South African education policies.

From the mentioned South African education policies, the next three stipulations have been selected for analysis:

Stipulation 1: *“Teacher practice is seen as a mode of delivery through which all the different roles of educators should be developed and assessed”* (Department of Education, 2000b: Section 3);

Stipulation 2: *“It brings clarity and coherence to the complex but critical matrix of teacher education activities, from initial recruitment as a student teacher, throughout the professional career of a teacher. The overriding aim of the policy is to properly equip teachers to undertake their essential and demanding tasks, to enable them to continually enhance their professional competence and performance, and to raise the esteem in which they are held by the people of South Africa”* (Department of Education, 2006: Section 1); and

Stipulation 3: *“The underlying principle is that teachers, individually and collectively, have a high degree of responsibility for their own professional development and the identification of their own professional need”* (Department of Education, 2008: Section 1).

Over the timeline of 2000-2008, the afore-mentioned stipulations from South African education policies communicate a similarity in discourse articulated as *“the professional development of teachers”*. This is evident in *“the different roles of educators should be developed”*, *“to continually enhance their professional competence and performance”* and *“responsibility for their own professional development”*. This similarity despite, the policies have different indications of who has to be responsible for teachers’ professional development. According to these policies, *“the provider”* (NSE); *“the policy”* (NPFTED) and *“teachers”* (CPTD) are responsible for teacher development in South Africa. *“The provider”* refers to a body (The South African Education Ministry) which delivers and manages learning programmes for development in South African education. *“The policy”*

represents the SAdoE as facilitator of teacher development, because education policy is prescriptive in nature – it instructs where schools ought to go to and what teachers should do (*vide*: De Klerk, 2004: 18-19). On the other hand, “*teachers*” are all those individuals who are qualified to teach other people and who are the implementers of education policies. In terms of the prior explanations, it is clear to me that South African teachers are positioned to respond to the educational challenges in relation to the espoused aims of education in this country. The preceding indications of similarities and differences may be considered directional in terms of who takes dominant or subordinate positions in these education policies. For me, all of these bring profound shifts in teachers’ practices as well as their relationships in education.

Furthermore, in the stipulation: “*the different roles of educators should be developed and assessed*” (NSE), I detect that teachers are placed in a subordinate position, because the policy may be seen as a mechanism of absolute state control and the regulation of the growth and development of teachers. On the other hand, in “*to properly equip teachers...to enable them...the esteem in which they are held by the people of South Africa*” (NPFTEd) I observe that the SAdoE is placed in a dominant position, whilst teachers are placed in both dominant and subordinate positions. In its dominant position, the SAdoE provides strategies as to how teacher development should occur, consequently placing teachers in a position of obedient implementers of policies. On the other hand, although teachers seemingly assume a dominant position regarding their own professional development, they are accountable to the SAdoE regarding such development. Thus, despite their dominant position, they are indebted to South African citizens to act as professional educational agents.

Already in the preceding analysis I become aware of acts of regulation by means of “who is dominant” and “who is subordinate” as portrayed in education policy discourse. However, to label regularities and make them nameable and describable, discursive formations in the stipulations need to be revealed. The revealing of discursive formations resonates with my research methodology which indicates that whenever deconstruction finds a nutshell, the very idea is to crack it open and disturb such tranquillity (Derrida & Caputo, 1997: 31-32). Thus, when discursive formations are brought into the open, regularities can be labelled, made nameable and describable.

Considering the prior explanation as to how probe regularities, the logical next step would be to analyse the three stipulations cited above (stipulation 1, stipulation 2 and stipulation 3) to find regularities in the mentioned three South African education policies.

The indication of “*a mode of delivery*” (Stipulation 1) may be interpreted as an effort by the policy to create governable subjects to control and contour teachers’ conduct. My interpretation is in line with Foucault’s notion of “*the conduct of conduct*” which refers to “*the power to act on the actions of others*” (Foucault, 1982: 220-221). Thus, it seems to me that in order for the SADOE to perform an act of assessment, teachers need to be subjected to governmental practices. The purpose would be to ensure that teachers adhere to the common good by performing their tasks under strict surveillance (Espinosa, 2010: 8). Consequently, a mode of subjectivity is imposed upon teachers to encourage them to behave in the best interest of the education department.

When teachers and their educational practices are managed as indicated above, the nature of relationships between educational administrators and teachers as professionals takes a different path (Kolsaker, 2008: 517). In this instance, teachers are “*properly equipped*”; “*enabled to continually enhance their professional competence and performance*” and “*have a high degree of responsibility for their own professional development and the identification of their own professional need*” (Stipulation 2). Although it seems as if teachers are afforded opportunities to manage their own development, it can be argued that this is not a responsibility founded on trust. For me, arguably, the supposed responsibility is eroded by “*to raise the esteem in which they are held by the people of South Africa*”. The SADOE thus put mechanisms in place to manage the conduct of teachers in order to achieve the ends they may postulate as desirable.

When teachers’ conduct are managed to achieve departmental outcomes, they spend increasing amounts of time making themselves accountable (Ball (2012: 19). Such accountability is evident in “*educators should be assessed*” (Stipulation 1); “*raise the esteem in which they are held*” (Stipulation 2) and “*a high degree of responsibility*” (Stipulation 3). For me, these stipulations imply that teachers need more skills to make the most of themselves and their educational practices. The basic premise here is that teachers are subjected to departmental rules which instruct them how to perform during their educational practices.

From the analysis above, I become cognisant of how discursive formations become visible in the way texts are made meaningful by showing how teacher practices are regulated. Consequently, the analysis puts me in a position to label, name and describe regularities which, according to me, are informative as to how teacher autonomy and professionalism are articulated in South African education policies in a globalised context. The following regularities are labelled by me: *governmentality*, *managerialism* and *performativity*. From the analysis above, *governmentality* becomes visible in “*educators should be developed and assessed*” (Stipulation1). In this way, the SADOE, through policy, controls; regulates and exercise authority over teachers. *Managerialism* emerges in “*to properly equip*”, “*to enable them*” and “*to continually enhance*”. Here, the SADOE justifies its right to control the activities of teachers through mechanisms of tight management. *Performativity* arises from “*responsibility for their professional development*”. In this sense, the SADOE regulates teachers by means of instruments of control so as to be prescriptive how they should perform in schools.

Governmentality, managerialism and performativity are known for decades in this country, mainly for its negative impact on the South African education policy landscape. However, I labelled these three regularities above; because I am convinced that it speaks out about teacher autonomy and professionalism in South African education policies in a globalised context. Significantly, the unique application of these regularities in this study derives from the notion that it was not loosely selected from the academic literature. Rather, governmentality, managerialism and performativity emerged as regularities after I applied archaeological thinking during an analysis of the NSE, NPFTED and CPTD. My preceding arguments resonate with first and third points regarding regularities. The first point indicates that regularities are not intentional, that is, no particular individual or group consciously created them (Scheurich, 1997: 99). The third point makes it clear that regularities are particular to particular points in time (Scheurich, 1997: 101). Thus, the labelling of the aforementioned regularities and its application can be regarded innovative, because it has been identified to explore how teacher autonomy and professionalism are articulated by South African education policies in a globalised context.

Subsequently, the labelled regularities (governmentality, managerialism and performativity) will be deliberated next to indicate how I intend to apply it to conduct a policy archaeology (Chapter 4) in this study.

3.5.1 Governmentality as regularity

This section will start with an overview of governmentality as regularity after which I shall seek to indicate how it can be applied as criteria to conduct a policy archaeology of South African education (*supra*: 3.5.1.1-3.5.1.4) to explore innovative perspectives on teacher autonomy and professionalism.

Taking Lemke's (2000) research as a point of reference, governmentality in social enquiry can be traced to a lecture of Foucault in 1978 at the College of France. Foucault uses the notion of government in a comprehensive sense geared strongly to the older meaning of the term and adumbrating the close links between forms of power and processes of subjectification (Lemke, 2000: 2). What I find interesting regarding the prior is how Foucault is able to show that "to govern" not only related to political tracts, but it also has relevance in, amongst others, philosophical and pedagogical contexts. Thus, by merging "governing" (*gouverner*) and "mentality" (*mentalité*) into the neologism "governmentality", Foucault emphasises the interdependence between the exercise of power and mentalities that underpin these practices (Lemke, 2000: 2-3). In other words, governmentality may be portrayed as an effort to create governable subjects through various techniques developed to control, normalise and inform people's conduct. For this reason, Foucault explain governmentality as the "the conduct of conduct", meaning that individuals are able to "govern the self" and to "govern others" (Foucault, 1982: 220).

The work of governmentality is concerned with the how individuals govern or how they are governed. In the words of Dean (1999):

"Governmentality is concerned with how we govern and how we are governed in terms of the relation between the government of ourselves, the government of others, and the government of the state" (Dean, 1999: 2-3).

For me, Deans' (1999) view places particular emphasis to issues of the government of human conduct in all contexts by various authorities, invoking particular forms of truth. It is, like Ketlhoilwe (2007: 89) explains, concerned with an analysis of specific conditions under which particular entities emerge, exist and change. Thus, to understand more, I contend that an analytics of governmentality is required.

3.5.1.1 An analytics of governmentality

Part of the application of governmentality, according to Dean (1999), is an explication of an analytics of governmentality. In the words of Dean (1999): “*Such analytic aims to examine the conditions under which regimes of practices (in education) come into being, are maintained and transformed*” (Dean, 1999: 21). It seeks to attend to, rather than efface, the singularity of ways of governing and conducting ourselves. Dean (1999) continues to say:

“An analytics of government attempts to show that our taken-for-granted ways of doing things and how we think about and question them, are not entirely self-evident or necessary. An analytics of particular regimes of practices, at a very minimum, seeks to identify the emergence of a particular regime, examine the multiple sources of the elements that constitute it, and follows diverse processes and relations by which these elements are assembled into relatively stable forms of organization and institutional practice” (Dean, 1999: 21).

In line with Dean’s view (1999), this research explore innovative perspectives regarding teacher autonomy and professionalism in South African education policies. I speculate that South African education policies contain particular regimes of practices which, when analysed, may reveal innovative perspectives of the mentioned discourses under study. The process of analysis by means of governmentality would involve questioning how teachers are governed through education policy. At the same time, aspects of who can govern, what governing is and who is governed and how, is called into question (Foucault, 1991: 103 and Rose, 1999: 19). Thus, to use governmentality as regularity, my approach of analysis would be geared towards problematizing the normatively accepted accounts of the SAdoE and to deconstruct its various components to explore innovative perspectives regarding teacher autonomy and professionalism.

Normatively accepted accounts may be considered as those processes by which individuals are induced to internalise a given set of norms, worldview or expected conduct (Darier, 1999: 21). In the South Africa, education policies contain given norms and standards which teachers in this country has to obey and which prescribe what teachers ought to do. For instance, one of the normative accepted purposes of the SAdoE is to: “*contribute to*

responsible autonomy and confidence of the teaching profession” (Department of Education, 2008: Executive Summary). I am of opinion that South African teachers have to live by this anticipation and are regulated in such a manner so as to be compliant educational agents in terms of what the SAdoE expects from them. Thus, if such an expectation is to be brought into the education arena, teachers’ autonomy and professionalism are regulated accordingly. The prior arguments motivate me to next explicate governmentality in education.

3.5.1.2 Governmentality in education

Governmentality in education operates at many places and sites such as through rules and regulations (Ketlhoilwe, 2007: 91).

In South African education, nodes of rules and regulation would include the Ministry of Education, provincial- and regional education officers, school principals, school management teams, teachers, parents and education policy, amongst others. From my teaching experience I am in a position to indicate that through each of the afore-mentioned entities there is a form of disciplinary power exercised by individuals. Disciplinary power is a mechanism of power that frames the everyday lives of individuals placing under surveillance their everyday behaviour, identity, activities and gestures (Foucault, 1979: 170 and Gordon, 2002: 126). Of significance in this study is how disciplinary power in education is exercised through education policy.

Entrenched within education policy are forms of power which include, amongst others *surveillance*, *exclusion*, and *regulation* (Ketlhoilwe, 2007: 93). Whilst *surveillance* regulates behaviour and enables comparisons to be made (Darier, 1999: 21), *exclusion* is a technique for tracing limits that will define difference, while *regulation* involves controlling by rule; subjection to restrictions, invoking a rule - including sanction, reward and punishment (Popkewitz & Brennan, 1998: 243). From the explanation of the preceding forms of power, I am now aware of the presence of governmentality in education. To illustrate my awareness, I argue that *surveillance*, *exclusion*, and *regulation* constitute instruments of government that regulates the domain of education. The afore-mentioned instruments are informative regarding the choices, desires, aspirations, needs and lifestyles of teachers in education (*vide*: Dean, 1999: 12 and Marston & McDonalds, 2006: 7). In relation to this study, I argue that education thus produces certain means and ends, meaning that it plays a significant role in

terms of teacher autonomy and professionalism. Significantly, education is directed by means of education policy and as such I deem it necessary to probe governmentality and it has been applied in education policy studies.

3.5.1.3 Governmentality and education policy studies

Until the 1990s, there had been few policy studies working with the concept *governmentality*. However, an increasing number of recent post-structuralist policy studies (Fairclough, 2000; Edwards, 2003; Tikliy, 2003; Ball, 2006; Olssen, 2006; Peters, 2004 and Simons, 2006) focused on language, power, discourses and locality. All the afore-mentioned researchers attempt to capture the complex “genealogy of the present” (Foucault, 1991) to understand how a particular form of the present has come into being and what conditions have accounted for particular “regimes of truth” being prioritised among other competing truths.

In different member states of the European Union (EU), particularly in Sweden, Germany and Belgium, the rise of governmentality studies can be attributed to processes of “governmentalisation of Europe”. For example, Andersson & Fejes’s (2005: 595-613) study focuses on the construction of an adult learner as subject in Swedish education policy. Drawing on Foucauldian governmentality and genealogy, the authors trace the shift in assessment policy discourses in the last fifty years from general knowledge and experiences to competences and performance which are to be evaluated.

In his PhD research, Ketlhoilwe (2007) applied governmentality to examine the administrative structure, integration and coordination of environmental education; the forms of training of teachers and the expertise expected from them in Botswana. Here, Ketlhoilwe (2007) investigates how teachers are governed by the policy and how they begin to govern themselves around a new policy framework.

In the South African context, Tikly’s (2003) article applies Foucault’s idea of governmentality to an understanding of education policy in South Africa. An account is given of governmentality theory as it has developed in relation to western industrialised countries and, in a more specialised literature, as it has been applied to illiberal states such as the apartheid state. Thus, the article applies the theory to an understanding of governmentality as it has evolved in the post-apartheid era (Tikly, 2003: 161-174). In

another account, Christie (2006) applies governmentality to educational restructuring in post-apartheid South Africa. The author argues that the nature of government in a modern state entails engaging with particular practices and domains of knowledge, which themselves constrain the changes that are conceivable and credible. Using Foucault's concepts of "conduct of conduct", "regimes of practices" and "saviors", Christie's (2006) study outlines the approach adopted by the new government in relation to establishing constitutional ground rules and managing the economy (Christie, 2006: 373-381).

From the preceding examples of research conducted, I deduce that governmentality may be viewed as a process of establishing rules so as to regulate teachers' knowledge, competencies and conduct with the aim to govern teachers as afford teachers an opportunity to begin to govern themselves. However, my application of governmentality in this research is totally different from studies as indicated above.

3.5.1.4 My application of governmentality as regularity

At times I experience a difficulty with the use of words in terms of how I intend to utilise the three identified regularities to conduct a policy archaeology of South African education. However, I have decided to use the concept "application" in this section as well as in section 3.5.2.4 and 3.5.3.4. I have taken this from Scheurich (19997). His explanation of how he tried to develop a different way of thinking about education policy studies (Scheurich, 1997: 113) brings sense to the use of "application". Furthermore, like Caputo, I believe that the use of words (in this instance, "application") is occupied by residual traces of other meanings (*vide*: Caputo, 1997: 43). Such meanings have reference to word such as "use" and "implementation", amongst others. Because my research methodology allows me to think differently, "application" will be used in this section as well as in 3.5.2.4 and 3.5.3.4.

Subsequently, in this section I shall explicate my application of governmentality as regularity.

Foucault's understanding of governmentality provides an alternative lens through which to explore education policy. An explication of why I intend to borrow from Foucault will be explained in the discussion below. What I do want to emphasise is that the advantage of such an approach is that it allows policy to be scrutinised on its own term, as discourse, and as such having a material effect in its own right (Tikly, 2003: 172).

My argument is that the application of governmentality as regularity allows for the possibility that education policy, understood as a programme and set of technologies of government, can be analysed to explore innovative perspectives regarding teacher autonomy and professionalism. To explore innovative perspectives about teacher autonomy and professionalism in South African education policy, I pose the following question: *what subjects do teachers become when regulated by South African education policy discourse?* There is no general theory in answering such a question, but an open space that lends itself to investigation is established. However, Foucault (2000) reminds us that governmentality manifests: “*as a way of thinking about the nature of practice of government ... capable of making some of that activity thinkable and practicable both to its practitioners and to those upon whom it was practised*” (Foucault, 2000a: 219-220). For me, Foucault’s view reiterates the meaning of governmentality as the “*conduct of conduct*” which play out in the governance of others (technologies of power) and of the self (technologies of the self). As such, based on my question above, the application of governmentality holds the two criteria to conduct a policy archaeology of South African education policies.

By considering governmental practices in South African education policies, my intended analysis will focus on exploring innovative perspectives regarding teacher autonomy and professionalism by means of:

Criteria 1: *governmental technologies of power*; and

Criteria 2: *practices of the self*.

The technique would be to explore the *mode of subjectification* (the authority to which teachers defer) as well as *art of governing the self* (the power afforded to teachers by education policy to become particular individuals). The application of governmentality as indicated here is not related to any general theory and therefore I argue that an open space is provided for investigating discourse under study. The suggested criteria will be explicated in Chapter 4 (*supra*: 4.5.1.1 and 4.5.1.2).

Closely link to governmentality is a technology of power which Foucault calls *managerialism* described by Rose (1989) as: “*the common ground of all modern forms of political rationality ... [constructing] the tasks of rulers in terms of calculated supervision and maximization of*

the forces of society” (Rose, 1989: 5). To provide a deeper understanding of Rose’s (1989) view, *managerialism* as regularity will be deliberated next.

3.5.2 Managerialism as regularity

The period between World War II and the 1960s have been considered a management boom that changed society, because management became a legitimate social process and a position of status supported by institutional norms (Cunliff, 2009: 17). These norms may refer to efficiency and productivity, amongst others that give managers a right to control and evaluate the performance of others (also teachers). Along with the management boom came *managerialism* which, as Deetz (1992) argues is: “*a kind of systemic logic, a set of routine practices and a way of doing and being in organisations which has the goal of enhancing efficiency through control*” (Deetz, 1992: 222). Considering Deetz’ (1992) views, this section will start with an overview of managerialism as regularity after which I shall seek to indicate how it can be applied as criteria to conduct a policy archaeology of South African education (*supra*: 3.5.2.1-3.5.2.4) to explore innovative perspectives on teacher autonomy and professionalism.

A further interpretation of Deetz’s view (1992) reveals as a more intricate and nuanced interconnection in which the meaning of work and the self in postmodernity are drawn in and are continuously reconfigured. My interpretation means that there may be a different logic that underpins management in postmodern times, that is, to manage through subjectivity. Managerialism depicts an explicit mode of domination. In this sense, managerialism makes it possible that efficient and effective actions are taken by managers to delineate and instrumentalise the conduct of persons to achieve the ends they postulate as desirable (Ball, 1998: 123). Management, itself, portrays a discursive outline. Costea, Crump & Amiridis (2007: 3) explain that: “*The human subject is converted into the main object of the production of the governance of production in general*”. The preceding view brings perspective to experiences from my own teaching experience. I regard it as an outcome in which teachers become objects of daily work mediated by a plethora of managerialist technologies. Although previously indicated (Chapter 2) as to how I (previously principal of a school) intended to afford autonomy to teachers, I have to admit that my focus on efficiency and obedience may have instilled uncertainty and a reduction in teachers’ ability to be

entirely independent. I now realise that a constant focus on measurability and efficiency may have contributed to a dwindling of teachers' autonomy and professionalism.

From the discussion in this section I become conscious that managerialism is set within identity formation (changing the identity of the self); efficiency (through modes of domination) and productivity (achievement of desirable outcomes). The prior awareness inspires me to look deeper into managerialism by providing a discussion on an analytic of managerialism.

3.5.2.1 An analytics of managerialism

Considered a political technology, underscored by excessive compliance and mechanisms of control, managerialism is legitimised by an: “*ethos of surveillance*” (Shore & Wright, 1999: 72) and “*best practices and accountability*” (Bundy, 2006: 6). As a consequence, practices of control by means of administrative, procedural and organisational strategies sculpt individuals' behaviour in organisations.

From a Foucaultian perspective (*vide*: Foucault, 1979: 139 & 170), I am of opinion that managerialism aims at producing, constraining and sustaining individuals as docile bodies through systems of continuous surveillance, examination and normalisation. The latter relates to Foucault's notion which is labelled “disciplinary technologies”. Within such technologies, discipline exists at those points where the actions of individuals and the effects of domination give way to individualisation and totalisation (Foucault, 1993: 203). The intention with individualisation and totalisation are to rule people in a continuous and permanent way (Deacon, 2006: 123).

I am of opinion that the latter forms of managerialism confine individuals to such an extent that they have to conduct themselves in accordance with the ideals of the professions they are part of. Therefore:

“Managerialism refashions the world in its image. Managerialism signifies the shift from the owner to the professional manager to legitimate the control of individuals” (*vide*: Currie, McElwee & Somerville, 2012: 62).

What I observe from the view above is that both surveillance and accountability are echoed by the use of “control”. For me, control inevitably limits individuals’ abilities to act independently and as such, they are rendered as passive and obedient practitioners. The prior happens when individuals are placed under authority which determines how they should conduct their professional practices (Jacklin, 2001: 24 and Foucault, 1981: 239).

The influence of managerialism as discussed above can also be drawn to the education terrain. What becomes visible in education is the way teachers are controlled and regulated to ensure compliance and increased productivity (Merson, 2001: 84).

3.5.2.2 Managerialism in education

The discourse of managerialism not only holds consequences for work practices, organisational methods and social relationships, but also for education. In this instance:

“Management discourses in education emphasises the instrumental processes of schooling – raising standards and performance as measured by examination results, levels of attendanceand is frequently articulated within a lexicon of enterprise, excellence, quality and effectiveness”
(Gerwitz & Ball, 2000: 253).

In my view, managerialist discourse as indicate above, impacts the lives and work of teachers. What one can witness here is the way how teachers’ tasks are narrowed due to regimes of surveillance and control which aims at ensuring compliance and increased productivity. If this happens, teachers are indirectly encouraged to compete with each other for the reward of such compliance (Merson, 2001: 84).

Symptomatic regarding the prior is that managerialism becomes representative of the right of one group (educational managers) to monitor and control the activities of others (Kolsaker, 2008: 515). The implication of such symptomatic is that it works against the critical social demand of education to sustain and develop democratic identities of and sound social relationships between teachers. Summarising this regularity, O’Brien & Down (2010: 114) posits that managerialism in education is rather about: *“the debate about the ‘what’ and the ‘why’ of education has been superseded by a fixation on the ‘how’”*.

The latter, according to Van der Walt, Potgieter & Wolhuter (2010: 292) is an indication of how education policy supports managerialism through regulations of school effectiveness, school improvement, teacher competence and accountability as well as raising standards of achievement.

3.5.2.3 Managerialism and education policy studies

Throughout the world, a process policy borrowing has intensified interest in the relationship between education and the new knowledge economy (Gleeson & Husbands, 2003: 501). Relevant to policy borrowing one finds discourse of managerialism set within assumptions about the inevitable logic of, amongst others, efficiency, accountability, productivity and competition. For Gleeson *et al.* (2003: 209), the prior managerial assumptions contributes to the creation of a more closely managed education workforce within a frame of quality assurance. To illustrate what I understand by Gleeson *et al.*'s (2003) view, I shall provide examples of managerialism in education policy studies below.

In Norway, a more explicit managerial approach to quality assurance was introduced (through education policy) into universities in the 1990's in the form of activity planning and performance indicators (Kogan, Bauer, Bleikli & Henkel, 2006: 143). Academics in Norway regarded this as an attempt to impose administrative control over universities as if such institutions were technical instruments to be used at will by politicians. Subsequently, Kogan *et al.* (2006) argue that such managerialist approaches restricted individual academic autonomy.

Different from the Norwegian experience, managerialism in the Australian education policy context (since the 1980 and 1990s) largely focuses on bringing about particular professional identities within schools (Eacott, 2011: 46). Such managerialist move is based on a market ideology and shifting focus of management to be more responsive to client demands. It is as if managerialism, within Australian education policy, emphasises specifications of outputs and targets, performance measurement as a means to its management and business-inspired practices (Cuthbert, 2011: 55).

On the other hand, in the context of South African education policy studies, education policies such as the *South African Schools Act of 1996* and the *Higher education Act of 1997*,

amongst others are underpinned by discourses of managerialism. Such discourses manifest via regimes of quality assurance with the aim of to regulate education and transforming institutions of higher learning into entities with less autonomy (Adams, 2006: 6). Possible implications of the latter may be found in the construction of new professional identities, the accommodation of existing values and in how universities have sought to define, govern and inform their own fields of social activities.

For me, international and South African research on managerialism and education policy mainly signifies a way of contributing to teachers' identity formation in the name of quality assurance. However, unlike any other research conducted before, in this study I shall apply managerialism as criteria of policy archaeology to analyse South African education policy with the aim to explore innovative perspectives regarding teacher autonomy and professionalism.

3.5.2.4 My application of managerialism as regularity

One of the main beliefs regarding managerialism is the notion of having "*the right to management*" (Wright, 2001: 281). Once "*the right to manage*" is exercised; it becomes apparent how managerialism regulates individuals (through education policy). In education, such regulation may be on the basis of quality assurance, efficiency and accountability. However, to explore the regulatory nature of managerialism in education, Gunter (1997) expresses the following view: "*Perhaps it is time to stand back and reflect on how managerialism is reshaping and reconstructing what we are doing*" (Gunter, 1997: 10).

Drawing on Gunter (1997), I intend to indicate how I shall go about in taking a step back to apply managerialism as regularity to conduct a policy archaeology of South African education policies. Such exploration is geared towards finding innovative perspectives regarding teacher autonomy and professionalism as articulated in South African education policies.

My intention relates with what Foucault calls "*bio-power*" which presents a form of bi-polar technology that generates political counter demands (Foucault, 1982: 211). Foucault's view (1982: 211) unlocks the notion of a "*strategic reversibility of power relations*" which lay the foundation for the criteria indicated below to apply managerialism in order to conduct a

policy archaeology of South African education policies. Thus, by considering managerial practices in South African education policies, this analysis will focus on exploring innovative perspectives regarding teacher autonomy and professionalism by means of:

Criteria 1: *managerialism as technology of domination*; and

Criteria 2: *managerialism as technology of self-constitution*.

The application of managerialism as indicated above has reference to Foucault's notion of productive power which entails an immanent capacity for reversal (Hacking, 1986: 137). If Hacking is right, then I regard managerialism as mechanisms of domination and legitimation, but also an instrument of empowerment. The latter confirms the reversibility character of managerialism based on control as well as a move towards how teachers can manage themselves through managerialist discourses. The suggested criteria will be explicated in Chapter 4 (*supra*: 4.5.2.1 and 4.5.2.2).

Managerialism, through its very mechanism of regulation and control, is tightly associated with audit systems and mechanism of accountability. The latter, according to Ball (2003) is very much in tandem with performativity. Performativity can be described as a culture where teachers organise themselves in response to, *inter alia*, audit indicators and evaluation to live in existence of standardised calculation (Ball, 2003: 215). Subsequently, in the next section I shall pay attention to performativity as regularity.

3.5.3 Performativity as regularity

This section provides an overview of performativity as regularity after which I shall seek to indicate how it can be applied as criteria to conduct a policy archaeology of South African education (*supra*: 3.5.3.1-3.5.3.4) to explore innovative perspectives on teacher autonomy and professionalism.

The concept *performative* was used by philosopher J.L. Austin (1962) in his book, *How to do Things with Words*, to question how things are done with words as part of a larger philosophy of action. One such question is articulated as: "How is it that language can function as a form of social activity, achieving different effects, causing people to act, bringing multiple reactions" (Pennycook, 2004: 10). Given the idea of how language moves individuals to act

in certain ways, the role ascribed to discourse in postmodernism, for example, as the site where subjectivities are formed and reality is produced, substance is given to the notion of *performativity* (vide: Pennycook, 2004: 11). Taking my cue from Van Wyk (2005: 7), this brings me to a question posed by Stephen Ball: “*What is meant by performativity?*”

Performativity is a technology, a culture and a mode of regulation that employs judgements, comparisons and displays as means of incentive, control, attrition and change – based on rewards and sanctions (Ball, 2003: 7). Within the latter characteristics of performativity, I want to share from my teaching experience how it is expected from teachers to position themselves as to how they should perform within their work. Due to educational demands and policy implementation I am aware that reporting and accountability can narrow teachers’ autonomy. Teachers acted as educational players capable of acceptably fulfilling their roles as required by the department of education. I now know that, in terms of performativity, it was actually expected from teachers at our school to be more effective, to take responsibility for working harder, faster and better to work towards improvement and productivity. My awareness seems to be in line with Ball (2010) when he proclaims: “*performativity offers us the possibility of being better than we were, or even being the best – better than others*” (Ball, 2010: 125).

If individuals perform in a manner as described above, I argue that performativity operates within a culture where accountability becomes a means by which an institution can call to account its members. This means that teachers are under tight surveillance with attempts to render transparent the details of their practice (Avis, 2005: 212). Consequently, performativity may be thought of as a way to suppress innovation and an action that encourages conformist practices. If such thought is to be understood, I argue that it is necessary to provide an explication of an analytics of performativity.

3.5.3.1 An analytics of performativity

Performativity is not an invitation to turn everything into words. On the contrary, performativity is the contestation of excessive power granted to language to determine what is real (Barad, 2003: 802). Hence, performativity is actually a contestation of unexamined habits of mind that grant language and other forms of representation more power in determining individuals’ ontologies than they deserve. My opinion is that performativity

then seems to be underwritten by an acknowledgement of the extent to which individuals act, and are acted upon, by language and various performative acts. My opinion seems to resonate with Butler's (1997) encapsulation:

"We do things with language, produce effects with language, and we do things to language, but language is also the thing we do. Language is a name for our doing: both what we do (the name for the action that we characteristically perform) and that which we effect, the act and its consequences" (Butler, 1997: 8).

Interpreting Butler (1997) here, I become cognisant that a performative act plays a significant role in identity formation. In this instance performativity is the mode of capability by which: *"we become other than the made selves that we happen, or are required, or forbidden, to become"* (Butler, 1990: 25). Such regimes are explicitly normative and compliance led. To the extent that individuals' selves are, under performance led regimes, produces for particular effects, their sense of identity is altered through their engagement in enacted fabrications of self and practices (Strain, 2009: 74). For me, such performance-led regimes may not necessarily be understood reductively. My argument is that performativity may contribute towards reflexive practices where individuals also get opportunities to escape from regulatory regimes to prospects of active self-actualisation.

Thus, I am of opinion that whilst performativity may exercise a binding power (compliance to regulatory demands), it is also a simultaneous and continuing opportunity for individuals to contribute towards the construction of their own identities in education.

3.5.3.2 Performativity in education

Lyotard (1984: 57-59) posits that performativity in education has been subsumed under the performativity of the wider social system. This is because education is required to create skills which are indispensable if the wider social system is to perform efficiently. These skills are of two kinds: those that contribute specifically to enable a country to participate in the markets of world competition and those that contribute to maintaining internal cohesion and legitimation (Marshall, 1999: 311). The implication of Marshall's (1999) view is that education is not to pursue or to produce ideals or to provide elite capable of guiding a society

towards emancipation. Instead, education aims at: “*supplying the system with players capable of acceptably fulfilling their roles at the pragmatic posts required by its institutions*” (Lyotard, 1984: 57-59). Considering Lyotard’s view (1984), I am of opinion that performativity act as regulative rules which instruct what teachers have to do. My argument is that regulative rules constitute teachers as people of a certain kind. Here, I turn to Foucault to frame the notion of “teachers as a people of a certain kind”. In *Discipline and Punishment* (1979) and *The History of Sexuality Vol I* (1980), Foucault talks of people being turned into useful, docile and practical individuals who have to perform in ways which elaborate an understanding of production and constraint (Marshall, 1999: 312 and Youdell, 2006: 515).

In relation to the preceding views, performativity is linked with increased accountability and surveillance under which teachers are being judged in terms of outcome and performance. For me, it seems that performativity discourses in education policies pervades teachers’ work. Implicit in such discourses is that teachers are considered successful when conforming to pre-defined performance criteria. Thus, it would be interesting to probe how performativity has been explored in education policy studies.

3.5.3.3 Performativity and education policy studies

A cursory glance at the academic literature reveals that the effect of performativity in education policy studies is to re-orient pedagogical and scholarly activities towards those which are likely to have an impact on measurable performance outcomes for the teacher, the group and the school (*vide*: Ball, 2010: 126). In this instance, I provide examples to explain performativity in terms of education policy studies.

In an article, *Creativity and performativity: counterparts in British and Australian education*, Burnard & White (2008) explore the complex interplay of power between *performativity* and creativity agenda that resides in British and Australian education. Their study revealed that: “*In a significant way, our interest in this sense of performativity relates to our argument that for reasons of control, efficiency and accountability, governments in the UK and Australia have overreached themselves, and in the process, have jeopardised teachers’ confidence to optimistically transform education for the future*” (Burnard & White, 2008: 674). The prior thoughts actually indicated how *performativity* was used to dictate teachers what to teach, when it is to be taught, and increasingly, how it is to be taught.

Divergent from the afore-mentioned research, Englund & Quennerstedt (2008) attempted to illustrate that one of the central concepts of educational policy in Sweden that of equivalence, has had an apparent *performative function*, implying that the language used not only describes but also evaluates and creates human action in education. Their analysis has shown how authority and truth, through performative function, are produced in education policy (Englund & Quennerstedt, 2008: 722). As such, performativity becomes a mechanism for advocating a certain way of understanding the purpose of education and how it justifies the moulding of specific educational realities.

Apart from the afore-mentioned examples from abroad, I read a recent published work of Le Grange (2011: 4) which shows interest in how performativity, as a mode of regulation, played out in South African higher education. In this study Le Grange (2011) alerts us of how the *Higher Education Act of 1998* legitimised the establishment of a *Higher Education Quality Committee* which are responsible for monitoring and regulating the quality of higher education programmes. Such regulation occurs through a process of accreditation of such higher education programmes. Consequently, teaching programmes in South Africa are subject to regulation by the state, even though, as indicated by Le Grange (2011) this might be by called, “remote control”. The implication is that performativity remains a regulatory regime in Higher Education in South Africa (Le Grange, 2011: 4).

In another South African study, Van Wyk (2005) contends that performativity in educational transformation focuses on the exclusive achievement of quality, efficiency and standards of excellence, amongst others, in institutional policy plans in three higher education institutions in the Western Cape province in South Africa (Van Wyk, 2005: 6-7). The author distinguishes between *performativity* and *excessive performativity*. Whilst the former focuses on performance indicators, the latter has reference to institutional attempts to comply with policy requirements by concentrating on performance indicators to such an extent that they leave little room for creativity and imagination (Van Wyk, 2005: 8). The author argues that unless performativity creates space for imagination and creativity, educational transformation at the three higher education institutions could be thin. In one of his conclusions, Van Wyk (2005) argues that: “*we cannot do away completely with performativity in educational transformation, but we need less performativity if we are to enact deep transformation*” (Van Wyk, 2005: 9). The prior view, according to the author, means that less emphasis should be placed on performance indicators to enact educational transformation.

In view of the above examples of research conducted, I interpret performativity as a tool which enables control, efficiency, accountability and evaluation with the aim to mould specific education realities. Thus, performativity in education policy plays a role in controlling the outcomes of the actions of teachers, but also regarding that of policy discourse. Taking cognisance of the role of performativity in education policy studies, I intend to apply performativity in this research as criteria to conduct a policy archaeology of South African education policy with the aim to explore innovative perspectives regarding teacher autonomy and professionalism.

3.5.3.4 My application of performativity as regularity

The discussion of performativity thus far has opened up significant ways of rethinking discourse and identity formation. Significantly, I argue, it provides a way of thinking about relationships between discourses and identity that emphasises the productive forces of language in constituting identity rather than identity being a pre-given construct. Arguably, identities are products of continuing performances of acts as prescribed by discourse (*vide*: Pennycook, 2004: 13).

In view of the above, my application of performativity as regularity is in line with Ball (2003) who argues that: “*performativity is a technology, a culture and a mode of regulation that employs judgements, comparisons and displays a means of incentive, control, attrition and change*” (Ball, 2003: 216). Within Ball’s view (2003) teachers become subjects of enunciation which Foucault refers to as a particular, vacant place that may be filled by individuals (Foucault, 1972: 95). I argue that such space, that is, the subjective modality of discourse, is not stable and as such an analysis by means of performativity may reveal what positions teachers occupy when they become the subjects of South African education policy discourse.

I expressed the view that performativity opens thought about individuals’ identity formation. The latter resonates with the notion that performativity acts as an unfolding space where change is allowed to happen (Dewsbury, 2000: 475). Such change is facilitated by rules: “*of a specific performance art*” (Dewsbury, 2000) in education policies that informs the reconfiguration of identities. Thus, in everyday circumstances teachers’ identities are constructed by the way are regulated by others (including, in narcissistic terms, themselves)

(*vide*: Dewsbury, 2000: 475). In lieu of how performativity regulates identity, my analysis will focus on exploring innovative perspectives regarding teacher autonomy and professionalism in South African education policies by means of:

Criteria 1: *the act of regularity creates a performance of identity;* and

Criteria 2: *modifying the identity of the self through the act of regularity.*

The application of performativity as indicated above is an extension of the work of both Nietzsche and Foucault in the sense that identity may be determined by discursively given norms (in education policy) and in how individuals reconfigure their own identities as prescribed by education policy texts (Butler, 1993: 12 and Cover, 2012: 180). Once performativity has taken root in education policy discourse, it demands perspectives on how teachers are regulated by education policy discourse. The suggested criteria will be explicated in Chapter 4 (*supra*: 4.5.3.1 and 4.5.3.2).

The identified regularities and its application are drawn from my interaction with Scheurich (1997). The emphasis, however, is on my application of the regularities rather than on Scheurich's. In doing so, I established intellectual freedom whilst also engaging respectfully with the mentioned author. While I openly acknowledge my significant debt to Scheurich, I also contributed to the knowledge corpus by conceptualising regularities (*governmentality*, *managerialism* and *performativity*) to conduct a policy archaeology of South African education policies.

Not only do the above expositions of governmentality, managerialism and performativity showcase the importance of rethinking teacher autonomy and professionalism in the South African context, but it also complements Derrida's notion of the "*archaeology of the frivolous*". For Derrida, the frivolous: "*is nothing more or less, than this gap or crack in the sign of itself*" (Derrida, 1980: 132). For me, it seems as if Derrida (1980) wants to alert the reader that gaps exist in communication (in education policy texts) and that there seems to be no way that meaning can be present in its totality at any one point. I become conscious as to how the "frivolous" shares similarity with Derrida's notion of "différance" which explains that meaning is in a constant state of change. Arguably, Derrida's notion of the "archaeology of the frivolous" strengthens my argument that governmentality, managerialism and performativity are important in exploring innovative perspectives regarding teacher

autonomy and professionalism in relation to South African education policy research. Given my argument that the afore-mentioned regularities may contribute towards thinking differently about teacher autonomy and professionalism, I intend to apply the identified regularities as criteria in Chapter 4 to explore innovative perspectives regarding the discourses under study.

Having indicated as to how I intend to apply the afore-mentioned regularities, I could not help but to be curious how my approach is in line with Arena 2 of policy archaeology (Scheurich, 1997).

3.6 ARENA 2 VERSUS THE RELEVANCE OF THE IDENTIFIED REGULARITIES FOR POLICY ARCHAEOLOGY

After engaging with Scheurich's (1997) views regarding Arena 2 of policy archaeology in Chapter 1, I made three points about regularities relevant to this study (*vide*: 1.7.4). Then, in this chapter, after conducting policy analysis, I identified and elucidate on three regularities that will be utilised to for a policy archaeology of South African education policies in Chapter 4. The latter in mind, I intend to illustrate the relevance of my interpretation of Arena 2 and the identified regularities for policy archaeology in this section.

First, the relevance of (the identified) regularities is grounded in: "*the configuration of knowledge that determines the orders and social practices in a particular era*" (*vide*: 1.7.4). The particular era in which innovative perspective regarding teacher autonomy and professionalism will be explored, refers to articulations of the afore-mentioned discourses in South African education policy in a globalised context.

Although Foucault's analysis of *governmentality* (the first identified regularity) begun in the late 1970's: "*the disciplinary forms of power related to governmentality remains evident in our globalised world*" (Hamann, 2009: 38). Governmentality, as an analysis of "*government*" or "*the conduct of conduct*" in a globalised context brings together the government of others (subjectification) and the government of the self (subjectivation). The latter happens because globalisation is considered "*regimes of truth*" that governs and orders teachers in particular ways (Sidhu & Christie, 2007: 7).

Managerialism (the second identified regularity) reinforces formalised approaches to organisational management, constitutes a diverse set of specialised knowledge and practices which have become associated with good governance. To achieve good governance, managerialism regulates institutions and humans by means of transparency, accountability and innovation. In so doing, teachers' images are managed, attempts are made to root out inefficiency and efforts are implemented to contribute to continuous capacity-building. When brought into comparison with globalised views, managerialism becomes: "*the fantasy position of the managerialist is that of holding the prince's ear*" (LaForgia, 2010: 979). Here the author explains that managerialism in a globalised context acts like an international court of a legal compliance structure which operates in terms governance, legitimacy and regulations. As such, managerialism becomes dominant in the sense that it whispers how "the prince" should conduct himself. I argue that managerialism, through education policy, becomes the whispering force which prescribes how teachers should conduct themselves during their teaching practices.

Performativity (the third identified regularity) is a contestation of excessive power granted to language, because it is generally relegated to a small category of verbs or acts that do what they say (Pennycook, 2004: 7). Acting in this ways, performativity enlightens about issues such as language and identity. In this paradigm, language becomes an enduring mode of social performance which produces new meanings to expressions of identity (Pennycook, 2003: 528). Recently (thus in a globalised context), performativity is considered a policy technology that: "*is now at work at all levels and in all kinds of education and public service*" (Ball, 2012: 19). In this instance, I argue that performativity seems to be linked to efforts, values, purposes and self-understanding that aim at making individuals more accountable with regard to performance measures and the achievement of (educational) outcomes.

Manifest from the preceding discussion is that the relationship between the identified regularities and globalisation depicts key features such as performance targets, accountability, standardisation, increased productivity and efficiency, amongst others. I suspect that the prior-mentioned key features will emerge as part of my analysis in chapter 4 and will be elaborated during a policy archaeology of South African education policies in the mentioned chapter. Furthermore, I argue that, since *governmentality*, *managerialism* and *performativity* can be regarded as aspects of globalisation and since globalisation has been established as the underpinning doctrine of recent reforms in education, the application of the identified

regularities may be deemed relevant. Interestingly, the relevance of the identified regularities strengthens my argument in Chapter 1 that we should open ourselves to be critical of how rules and regularities in South African education policy documents are informative about the discourses of teacher autonomy and professionalism (*vide*: 1.2). The identified regularities can therefore assist in my search for innovative perspectives on teacher autonomy and professionalism in South African education policies in a globalised context.

Second, relevant to this study, (the identified) regularities: “*constitute categories of thought and ways of thinking about discourse under study*” (*vide*: 1.7.4). The identified regularities provide criteria to conduct a policy archaeology of South African education policies to uncover innovative perspectives regarding teacher autonomy and professionalism.

Third, “*social agents (teachers) are not necessarily aware of the regularities that inform their subjectivities and their practices*” (*infra*: 1.7.4). As Foucault posits: “*all is surface, meaning not that everything is superficial but that everything happens at the surface, that is, within the context of human activity...*” (Foucault, 1972: 62). Interpreting Foucault, I want to make the point that regularities, amidst human activity, rises from the depth of history and constantly changes over periods of time. Thus, because regularities are not stable, it is difficult to trace their origin of emergence and how they inform teachers’ subjectivities and practices. Once again Foucault explains: “*These regularities themselves, however, are not necessarily visible to social agents even though they exist at the surface of human practices*” (Foucault, 1972: 62).

In this section I attempted to explicate that the identified regularities, *governmentality*, *managerialism* and *performativity*, are indeed in line with Scheurich’s (1997) Arena 2 of policy archaeology. Having established the latter, I consider it necessary to eliminate any confusion that may arise as to why regularities on its own should not be seen as policy archaeology.

3.7 WHY REGULARITIES SHOULD NOT BE CONFUSED WITH POLICY ARCHAEOLOGY AS RESEARCH METHOD

In this section I want to explain why regularities should not be confused with policy archaeology as such. Regularities should be regarded as an orientation towards conducting a policy archaeology and not necessarily as a recipe for doing it.

The research process of policy archaeology seeks to uncover innovative perspectives of discourse under study. One of the premises on which such a search is built is that it communicates the idea that there are powerful grids or networks of regularities to explore apparent unshakeable meanings in education policy texts (Ramsuran & Malcolm, 2006: 516). In line with the preceding view I want to reiterate that regularities are productive and reproductive in the sense that it constitutes categories of thought and ways of thinking about discourse under study. Regularities can therefore be considered fundamental rules which construct the *episteme* or configuration of knowledge that determines the orders and social practices of a particular era (Scheurich, 1997: 100).

Therefore, regularities constitute policy archaeology in the sense that it allows for a disruption of what is said and written in education policy texts. Thus, by conducting policy archaeology by applying regularities, the policy archaeologist is enabled to think differently about discourse under study. By conducting policy archaeology, I echo Foucault by saying:

“I tried to explore scientific discourse not from the point of view of the individuals who is speaking, nor from the point of view of the formal structures of what they are saying, but from the point of view of the rules that come into play in the very existence of discourse” (Foucault, 1994a: xiv).

In explaining myself (also Foucault) in line with this study, regularities are thus the rules of formation that enable me to conduct a policy archaeology of South African education policy to explore innovative perspectives regarding teacher autonomy and professionalism.

3.8 CHAPTER SUMMARY

The aim of this chapter was to probe what regularities in South African education policies in a globalised context may be labelled as frames to conduct a policy analysis. Before regularities could be labelled, a deconstruction of *globalisation* was undertaken. I indicated

that globalisation puts forward processes that offer views regarding education policy in general and more specifically South African education policy (*infra*: 3.2).

I analysed education policy discourses from Western and African countries to explore the influence of globalisation on such policies, whilst I was also observant of the influence of globalisation on teacher autonomy and professionalism in those countries. My analysis revealed that teacher autonomy and professionalism in Western and African countries are mostly regulated by managerialism, because those policies impose a range of subjectivities that encourage teachers to behave in the best interest of their respective education departments. This was necessary, because it paved the way to explore how South African education policy in a globalised context performs the role of regulator and constructor of teachers' roles.

Before analysing South African education policies to search for regularities, I established an understanding of what regularities entail. I indicated that regularities constitute frames of thinking with which to articulate and consider innovative perspectives of discourse under study (*infra*: 3.3.3). Armed with this knowledge, I then analysed the NSE, NPFTED and CPTD. From the analysis, three regularities were identified and elucidated on. A brief summary follows.

Governmentality examines the conditions under which regimes of practices are maintained and transformed. An application of governmentality to conduct a policy archaeology of South African education policies would entail how teachers are governed and how they are governing themselves (*infra*: 3.5.1.4).

Managerialism regulates teachers by means of mechanism such as transparency, accountability and efficiency, amongst others. An application of managerialism to conduct a policy archaeology of South African education policies would be based on the control over teachers and how teachers can manage themselves through managerialist education policy discourses (*infra*: 3.5.2.4).

Performativity regulates by means of judgements and comparisons and is displayed as a means of incentive, control, attrition and change. An application of performativity to conduct a policy archaeology of South African education policies would entail an exploration as to

how the act of regularity creates a performance of identity and the identity of the self is modified through the act of regularity (*infra*: 3.5.3.4).

Do the identified regularities justify a policy archaeology of South African education policies to explore innovative perspectives on teacher autonomy and professionalism? My answer is “yes”, because the policies analysed in this chapter contain discursive embodiments which assist in regulating teachers’ practices and how they are positioned in educational settings.

As a result, the identified regularities paved the way for a policy archaeology of South African education policies. Such analysis will be conducted in the next chapter.

CHAPTER 4

POLICY ARCHAEOLOGY OF SOUTH AFRICAN EDUCATION POLICIES

4.1 INTRODUCTION

In this chapter I intend to apply the identified regularities from the previous chapter as criteria to conduct a policy archaeology of South African education policies (*infra*: 3.5.1.4, 3.5.2.4 and 3.5.3.4). By utilising the identified regularities, policy archaeology will enable me to probe how teacher autonomy and professionalism are articulated in the NSE, NPFTED and CPTD. Education policy discourse will be analysed in terms of the operation of rules that bring it into being. By this I mean that policy archaeology attempts to account for the ways in which education policy communicates with the reader. In view of this study, I am convinced that, during the application of policy archaeology, discourses in the three mentioned South African education policies will be “opened up” to gain innovative perspectives regarding *teacher autonomy* and *professionalism*. Thus, whilst the development of innovative perspectives on the discourses under study requires a transformation of our ways of thinking, it also envisions a reconstruction of existing knowledge regarding *teacher autonomy* and *professionalism* in South African education policies.

Of particular interest to this research is the phrase, “innovative perspectives regarding *teacher autonomy* and *professionalism* as articulated in South African education policies”. By emphasising this phrase, I become more cognisant than before of the significance of postmodern deconstruction as my research methodology. I am thus mindful of what Caputo (1997) accentuates when he pronounces:

“Every time you try to stabilise the meaning of a thing, to fix it in its missionary position, the thing itself, if there is anything at all to it, slips away ... deconstruction bends all its efforts to stretch beyond these boundaries, to transgress these confines, to interrupt and disjoin all such gathering” (Caputo, 1997: 31-32).

Considering Caputo’s (1997) view, I intend to contest the idea that meanings of teacher autonomy and professionalism are fixed. Thus, an exploration of innovative perspectives

regarding the mentioned discourses is an attempt to explore meanings which may not be foreseen as possible, because it should be considered that innovative perspectives might have been muted, repressed or possibly never be heard of. Not only do I regard an analysis of this kind as an important challenge, but it also emphasises the significance of this research, that is, to contribute to the expansion of the edifice of knowledge to the field of Policy Studies in Education (*infra*: 1.10).

In this chapter, I intend to analyse the *Norms and Standards for Educators (2000)*, *National Framework for Teacher Education and Development in South Africa (2006)* and *Continuing Professional Teacher Development (CPTD) System (2008)*. These education policies provide a close picture of educational development in South Africa and are undoubtedly informative with respect to teacher roles, autonomy and professionalism, amongst others. The criteria for analysis in relation to the identified regularities (*infra*: 3.5.4.1, 3.5.2.4 and 3.5.3.4) will be utilised to conduct a policy archaeology of the three mentioned education policies.

In view of a policy archaeology of South African education policies, this chapter will unfold in five stages: (i) an overview of South African education policy development and teacher regulation will be presented; (ii) a reminder of policy archaeology and the identified regularities follows; (iii) contextual portrayal of the three South African education policies towards a policy archaeology will be provided; (iv) a policy archaeology of the three South African education policies to reveal innovative perspectives regarding teacher autonomy and professionalism will be conducted; and (v) an explication of the proposed innovative perspectives will be presented.

In view of my indication of how this chapter will unfold, I shall start with an overview of South African education development and teacher regulation.

4.2 SOUTH AFRICAN EDUCATION POLICY DEVELOPMENT AND TEACHER REGULATION

The objective of this section is not to rehearse in detail the education policy development in South Africa since 1995, because this has been done elsewhere by Jansen (2000). Rather, I shall briefly reflect and argue along the following lines: *that education reform and policy*

making in South Africa amidst globalisation have significant implications for teacher autonomy and professionalism.

My own experience with education policies and the changing context of education policy development in South Africa began in 1993 when I started my career as a teacher. What I am quite cognisant of is the fact that post 1994, education reform process in this country is driven by goals such as access, equity, redress, quality, efficiency and democracy, amongst others (*vide*: Department of Education, 1995: Section 3). Not only did the prior goals guide learning, but it also initiated direction as to where South African schools ought to go in future and subsequently prescribed what teachers should do to accomplish such goals. Consequently, the afore-mentioned goals have guided the materialisation of several education policies of which I shall give some examples of. The examples will be considered a representation of established education policies since 1995.

First, a *National Qualifications Framework (2008)* was developed to measure skills against socially agreed standards at the end of learning or training (Organisation for Economic Co-operation and Development (OECD, 2008: 76). Second, an *Outcomes-Based* curriculum was designed (Department of Education, 1997b) with new teaching strategies and a move towards learner-centeredness (OECD, 2008: 80). Third, the *Norms and Standards for Educators* are known for the identification of seven roles for educators in this country (Department of Education, 2000b: Section 3). Fourth, a *National Framework for Teacher Education and Development in South Africa* aims at equipping teachers to undertake their demanding tasks and to enable them to continually enhance their professional competence (Department of Education, 2006: Section 1). Fifth, according to the *Continuing Professional Teacher Development (CPTD) System* teachers should have a high degree of responsibility for their own professional development and the identification for their own professional needs (Department of Education, 2008: 4).

Reflecting on my teaching experience, the afore-mentioned education policies have implications for teachers in terms of their roles as well as teacher autonomy and professionalism at South African schools. It requires the development of teachers as professionals; encourages new knowledge acquisition and production as well as stimulating teachers as workers with globally equivalent skills and individuals who are socially responsible of their role in contributing to national development. Thus, education policy

development regulates teachers in terms of their responsibilities, competences, conduct, effectiveness, professional development and autonomy (Jansen, 2004: 57). If this happens, experience has taught me that teachers' autonomy is impeded in terms of teachers' ability to contribute to their own skills development and their right to freedom from control. In terms of professionalism, teachers' professional status is undermined, because of the above-mentioned mechanism of control in respect to their teaching practices (*vide*: Raymond, 2006: 33 and Yan, 2010: 175).

Considering the afore-going overview and in line with this study, it is evident to me that teacher autonomy and professionalism are regulated in terms of education policy discourse. This view substantiates my argument that *education reform and policy making in South African amidst globalisation have significant implications for teacher autonomy and professionalism*. Taking a cue from Cannella & Lincoln (2004: 302), I argue that an analysis of South African education policies in a globalised context would enable me to rethink and reconceptualise the ways in which teacher autonomy and professionalism are articulated in the NSE, NPFTED and CPTD. Previously, I indicated that such an analyses will be by means of a policy archaeology in this chapter (*infra*: 1.7.4.2). Before an analysis will be conducted, I deem it necessary to refresh the reader's memory on how I shall go about to apply the identified regularities to conduct a policy archaeology of the three mentioned South African education policies.

4.3 POLICY ARCHAEOLOGY AND THE IDENTIFIED REGULARITIES: A REMINDER

In this section I want to refresh the reader's memory regarding policy archaeology and how the identified regularities from the previous chapter will be applied to explore innovative perspectives regarding teacher autonomy and professionalism in South African education policies.

In Chapter 1, I indicated that Scheurich (1997) is quite clear about the difference between policy archaeology and conventional methods of policy studies. Whilst conventional policy analysts tend to identify a specific policy problem and also search for specific policy solutions, policy archaeology takes a radically different approach to policy studies in all its aspects (*infra*: 1.7.4.3). Policy archaeology exposes:

“The rules of formation regarding discourses of discursive systems... It examines the forms of regularity that is the discursive conditions, which order the structure of a form of discourse and which determine how such orders come into being. Archaeology attempts to account for the link between perception and action and why at different periods specialists in knowledge perceive objects differently” (Olssen et al., 2004: 46).

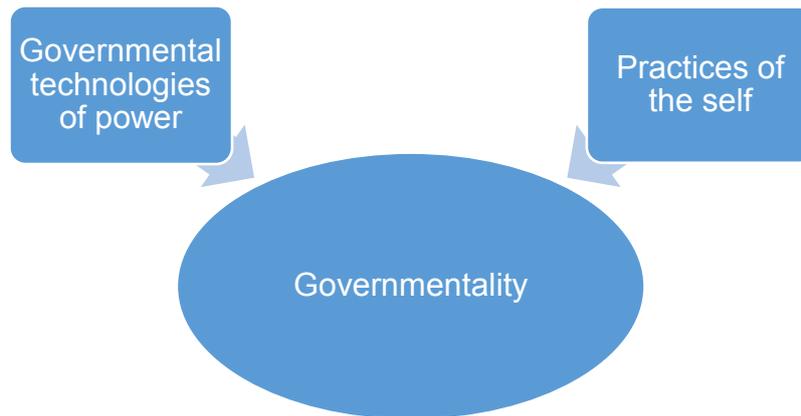
In terms of the prior delineation, I realise that I have been obedient to policy archaeology’s call in the sense that I labelled and intend to apply regularities with the aim to explore innovative perspectives regarding teacher autonomy and professionalism (*infra*: 1.7.4.3). In Chapter 3, I analysed three South African education policies to label, make nameable and describable three regularities (*infra*: 3.5) to conduct a policy archaeology. Since my analysis of the three education policies may be considered an original contribution to the knowledge corpus, I suggest that the identified regularities and criteria for analysis be called: ***De Klerk’s Identified Regularities for Policy Archaeology***. Consequently a discussion of the regularities follows in the next section.

4.3.1 De Klerk’s Identified Regularities for Policy Archaeology

In Chapter 3 I analysed three South African education policies in search of regularities that could be used to conduct a policy archaeology to explore innovative perspectives regarding teacher autonomy and professionalism (*infra*: 3.5). In that analyses I identified three regularities namely *governmentality*, *managerialism* and *performativity* to conduct a policy archaeology.

A summarised representation of the regularities and criteria for analysis is provided in figure 1 below.

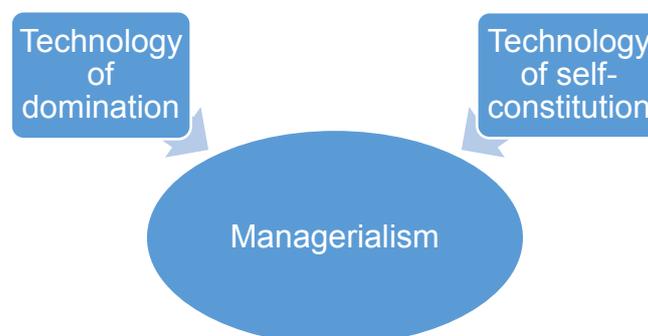
Figure 1: Governmentality and its criteria for analysis



Governmentality is concerned with the art of government in terms of how teachers are ruled, by whom and to what extent (*infra*: 3.5.1.4). **Criteria 1**, *governmental technologies of power* and **Criteria 2**, *practices of the self* will be utilised during the application of governmentality as regularity. First, I intend to explore the creation of governable subjects through various techniques developed to control, normalise and shape people's conduct. Second, my aim is to explore how the three South African education policies, in terms of governmentality, afford teachers opportunities to govern themselves in educational environments.

Next, *managerialism* as regularity will be applied to explore innovative perspectives regarding teacher autonomy and professionalism. Figure 2 contains an illustration of the criteria for analysis.

Figure 2: Managerialism and its criteria for analysis

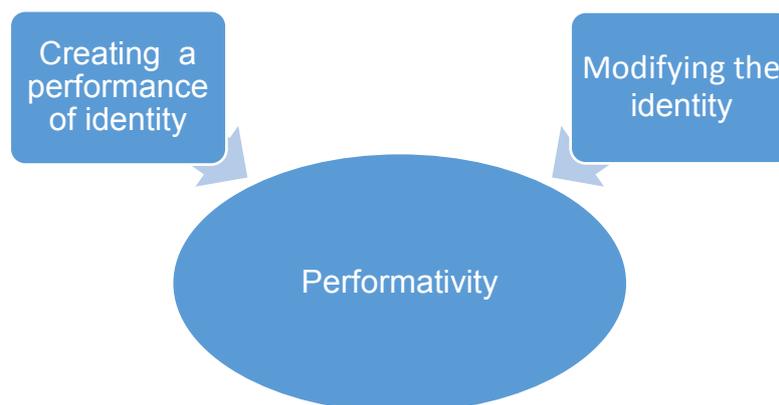


Managerialism is a mode of discipline and meta-narrative for continuous self-production. Since the self is subject to globalised reforms, management of self is a matter of education

(*infra*: 3.5.2.4). By considering managerial practices in South African education policies, this analysis will enable me to focus on exploring innovative perspectives regarding teacher autonomy and professionalism by means of **Criteria 1**, *managerialism as technology of domination*; and **Criteria 2**, *managerialism as technology of self-constitution*. Here, I realise that the application of managerialism contains a capacity for reversal. This means that managerialism can be considered a mechanism of domination, but also an instrument of empowerment.

Closely in tandem with managerialism, the next regularity, *performativity*, will be applied to analyse South African education policies. A summation of the criteria for analysis is depicted in figure 3.

Figure 3: Performativity and its criteria for analysis



Performativity is a technology, a culture and a mode of regulation that opens new ways of thinking about teachers' identity (*infra*: 3.5.3.4). Thus, in terms of the way in which performativity regulates identity, my analysis will focus on exploring innovative perspectives regarding teacher autonomy and professionalism in South African education policies. Such an analysis will occur by applying **Criteria 1**: *the act of regularity creates a performance of identity*; and **Criteria 2**: *modifying the identity of the self through the act of regularity*. For me, the application of performativity is significant in the sense that identity may be determined by discursively giving norms (in education policy) and how individuals reconfigure their own identities as prescribed by education policy texts.

The identified regularities and its application are drawn from my interaction with Scheurich (1997). Therefore, the focus will be on my application of the three identified regularities and its criteria rather than on Scheurich's application of regularities for policy archaeology. The three identified regularities and its criteria will be applied to conduct a policy archaeology of South African education policies. Subsequently, a contextual portrayal of the three education policies will be provided as a starting point towards a policy archaeology.

4.4 TOWARDS A POLICY ARCHAEOLOGY OF SOUTH AFRICAN EDUCATION POLICIES

This section serves to provide a brief contextual portrayal relevant to the *Norms and Standards for Educators (2000)*, the *National Framework for Teacher Education and Development in South Africa (2006)* and *Continuing Professional Teacher Development (CPTD) System (2008)*. My intention is to offer insight into the objectives of each policy and how its content will be analysed by means of policy archaeology.

Next, a contextual portrayal of the *Norms and Standards for Educators (2000)* follows.

4.4.1 *Norms and Standards for Educators (2000)*: Contextual portrayal

This section provide a brief conceptual portrayal of the *Norms and Standards for Educators (2000)* followed by an explication of the significance of the phrase *norms and standards* in sub-section 4.4.1.1.

The process of establishing a regulatory framework for teacher education programmes in South Africa began in 1995. Such regulatory framework was published for discussion in 1998 and gazetted as the *Norms and Standards for Educators (hereafter: NSE)* in 2000. This policy initiates a framework for the approval of teacher education programmes and provides an outline of knowledge, skills and values that are seen as the hallmarks of a professional and competent teacher (Robinson, 2003: 19). South African teachers' competencies are articulated in seven roles that regulate their proficiencies as to what kind of teacher the SAdoE wishes them to be. At this stage, like Welch & Gultig (2002: 1), I do not consider the use of "professional" and "competent" as peculiar. After all, teachers' education should, amongst others include the development of their knowledge of teaching, subject content and

teaching skills. However, what is noteworthy to probe, I argue, is my observation that “professional” and “competent” seem to be engaged in the use of *norms and standards* indicated in the title of this policy. The use of *norms and standards* seems to provide a description of what it means to be a competent teacher in South Africa. Therefore, an analysis of the phrase *norms and standards* is vital, because I believe that it may further contribute to contextual information regarding the NSE.

4.4.1.1 The use of “norms and standards” in the NSE

An analysis of a phrase *norms and standards* reveals principles that govern the appropriate use of such an expression. This means that:

“Norms are rules, patterns or authoritative standards. Norms are standards to ascertain whether something is correct, accurate and precise as it should be” (De Klerk, 2004: 8-9).

De Klerk (2004: 8-9) indicates that *norms and standards* may be interpreted as directives or guiding principles which aim to control or regulate behaviour. Competencies such as mediation of learning programmes, managing their classroom and interpreting learner results, amongst others, (Department of Education, 2000b: Section 7) act as norms and standards that regulate how teachers should behave. I regard such regulation as an objective of the NSE to ensure that teachers should know how to perform their tasks when they are about to make instructional decisions regarding their teaching practices. Norms and standards therefore, may be considered rules or directives that teachers should follow when they design and deliver their learning programmes and qualifications (*vide*: Adams, 2004: 137). This confirms the notion that the NSE may be regarded a policy framework which is directive pertaining to the roles of teachers in education.

If the NSE is regulative as explicated here, I contend that it holds implications for the way teacher autonomy and professionalism are articulated in this policy. One such implication resonates with the notion that norms and standards intend to re-educate teachers in terms of their autonomy and professionalism, because: *“the knowledge base of professionals, the source of their previously much valued expertise, has become less secure”* (Quicke, 2000: 302). This view, aligned with South African education policy in a globalised context,

requires that competing versions of discourse be probed, rather than entertaining essentialist definitions of discourses like teacher autonomy and professionalism. Therefore, my intention is to analyse the NSE by means of policy archaeology to explore innovative perspectives regarding the afore-mentioned discourses. Stipulations from the NSE will be cited during the analysis of this policy.

After a scrutiny of the NSE, my focus will shift to an analysis of stipulations from *The National Policy Framework For Teacher Education and Development in South Africa (2006)*.

4.4.2 *The National Policy Framework For Teacher Education and Development in South Africa (2006): Contextual portrayal*

In this section, I shall provide a brief conceptual portrayal of the *National Policy Framework For Teacher Education and Development in South Africa (2006)*. Thereafter, an explication of the significance of the phrase *development* will be presented in sub-section 4.4.2.1.

Being employed as a teacher (1993 until 2009), I was part of the serving teacher corpus that experienced changes in South Africa in terms of a move towards a non-racial and democratic transformation of the education system. Not only did teachers experience the establishment of a single national education system, but they were also challenged with, amongst others, cultural diversity and the introduction of a new curriculum. For me, the mentioned challenges emphasise greater professionalism in terms of the South African Department of Educations' expectations that teachers should have new knowledge and applied competencies relevant to the demands of globalisation.

My experience seems to align with inscriptions in *The National Policy Framework For Teacher Education and Development in South Africa (2006)*. This policy is designed to develop a teaching profession ready and able to meet the needs of a democratic South Africa in the 21st century. The overriding aim of the policy is to:

“Properly equip teachers to undertake their essential and demanding tasks, to enable them to continually enhance their professional competence and performance, and to raise the esteem in which they are held by the people in South Africa” (Department of Education, 2006: Section 1).

The use of “*equip*” may hold consequences for teacher autonomy and professionalism. I argue that “*equip*” may act as a regulatory intervention which aims at giving teachers an understanding of who they should be (professionalism) and what they are supposed to be capable of (teacher autonomy) (*vide*: Foucault, 1973: 312). An attempt to “*equip*” teachers stems from the rationalisation of the teaching corps due to educational changes after 1994. These changes require that South African teachers have to deal with a new curriculum, to have new knowledge aligned with global imperatives and to have the competence to use new technologies (Department of Education, 2006: Section 10). In a globalised context, to “*equip*” may be an attempt of the SAdoE to contribute to the development of teachers in this country in terms of education. Since teacher development is based on a contribution to professionalism and autonomy as means for effective professional practice (Bush & West-Burnham, 1994: 285-286), I regard an explication of “development” necessary, because I am convinced that it contributes significantly to contextual information regarding this policy.

4.4.2.1 The use of “development” in the NPFTED

Marcelo (2009: 6) proclaims that: “*not everyone is capable of being an effective teacher and keeping up teaching standards over time*”. If Marcelo (2009) is accurate, then it comes as no surprise to me that the NPFTED stipulates that: “*the majority of teachers have not yet been sufficiently equipped to meet the education needs of a growing democracy*” (Department of Education, 2006: Section 11). If the prior call is to be adhered, teachers should be developed in relation to information change, the use of technology and a growing body of knowledge concerning new teaching content. This may result in teachers becoming more responsive in terms of engaging in communication, collaborative planning as well as taking responsibility for applying contemporary teaching strategies (Paine & Fang, 2006: 287). Consequently, I am of opinion that the prior examples of teacher development may be considered a dialectic of ideas and practices which aims at addressing individual, professional and organisational competencies of teachers. Thus, to “develop” is to create opportunities to strengthen professional growth of teachers in order to maintain a high standard of teaching and to retain a high-quality teacher workforce.

Considering the foregoing, I argue that the use of *development* in the NPFTED signifies the presence of regulatory mechanisms aiming at contributing to reconfiguring what South African teachers should be. Such regulation holds consequences for the way teacher

autonomy and professionalism are articulated in this policy. Some consequences, according to Smith (2003: 1), imply the ability to develop skills, knowledge and attitudes for oneself as a teacher in cooperation with others. This may result in teachers becoming aware of existing skills they possess as well as encouraging them to take responsibility for the choices to be made in schools and their classrooms. Therefore, I argue that an analysis of the NPFTED by means of policy archaeology may be deemed vital to explore innovative perspectives regarding the afore-mentioned discourses. Such exploration may fertile new ground to reconnect teachers with autonomy and professionalism so as to possibly achieve the autonomy and professionalism they might be hoping for. In fact, I argue that teacher autonomy and professionalism should be part of an awareness of and a continuous search for an enhancement of teachers' beliefs, theories and educational practices. By the prior view I mean that development of teachers' dogmata, opportunities to consider innovative perspectives regarding teacher autonomy and professionalism may be boosted.

Although the NPFTED serves to contribute to the professional development of South African teachers, the process of development does not stop here. A group of authors assert that: "*To allow professional development to proceed successfully it should be a continuous process*" (Muijs, Day, Harris & Lindsay, 2004: 291). In terms of the aforementioned demand and considering the NPFTED's objectives, the CPTD was developed to expand teachers' professional development in this country. Subsequently, I offer a contextual portrayal of the CPTD.

4.4.3 *Continuing Professional Teacher Development (CPTD) System (2008): Conceptual portrayal*

I intend to provide a brief conceptual portrayal of the *Continuing Professional Teacher Development (CPTD) System (2008)* in this section after which an explication of the significance of the phrase *continuing professional development* will be presented in subsection 4.4.3.1.

In 2008, a year before I was appointed as lecturer at a university in South Africa, the CPTD was published. The mentioned policy, which was jointly prepared by the *South African Council of Educators (SACE)* and the *SADoE*, presents a management system for the continuous development of individual teachers. Hence, the vision of the CPTD is to:

“Support and facilitate a process of purposeful, high quality continuing professional development for all registered teachers, to revitalise the teaching profession and to reward teachers who commit themselves to these goals” (Department of Education, 2008: Section 2).

I find the use of “*to reward*” quite interesting in the vision of the CPTD. From a behaviouristic stance, “*to reward*” can be interpreted as a way to encourage teachers to act in certain ways so as to achieve the realisations of goals. In an attempt to realise educational goals, teachers’ knowledge and skills should be enhanced to improve the quality of teaching. In doing so, teachers may be rewarded – not only in terms of monetary compensation, but also in terms of, amongst others, updating their teaching skills and gaining confidence to take charge of their professional roles (*vide*: Steyn & Wilkinson, 1998: 204). When this happens, teachers become autonomous and self-knowing professionals who are capable of working with others to achieve educational goals on a continuing basis.

In view of the above explication, I deem it critical to explore the use of *continuing professional development* in the title of the CPTD. I am of opinion that an illumination of the afore-mentioned phrase is relevant, because it may further contribute to the contextual frame of this policy.

4.4.3.1 The use of “continuing professional development” in the CPTD

Continuing professional development of teachers implies an enduring process that lasts for the duration of the career of teachers (Department of Education, 2008: Section 1). Experience as a teacher has taught me that continuous development, as used by the SAdoE, points to a competence-oriented pattern regarding teachers and their practices. The implication of such action is that development is geared towards an approach of lifelong learning. My argument resonates with Miller’s (1991) view that a movement towards lifelong learning includes:

“Formal, non-formal and informal learning extended throughout the lifespan of an individual to attain the fullest possible development in personal, social and professional life” (Miller, 1991: 8).

For me, Miller's (1991) view encapsulates an attempt to further enhance the professional development of teachers so as to strengthen teachers' competence and educational responsibility within a vision of education (SADoE) as an entity of empowerment. Thus, an investment in continuous professional development is inevitable for keeping up with educational changes and competitiveness – not only locally, but also with global educational developments in mind (*vide*: Rubenson, 2011: 413). Not only do I regard the prior view as significant in terms of teachers improving competence, knowledge and skills, but also to find pathways to grow and learn throughout their professional careers.

I contend that analysis of the CPTD may be considered vital in exploring innovative perspectives regarding teacher autonomy and professionalism. This policy advocates a re-imagining of teachers' professional roles so as to update and familiarise them with new developments in education. My argument is that when teachers are empowered on a continuous basis, they may be ready to function more successfully in a globalised world.

Thus, in terms of this study, a policy archaeology of the three afore-mentioned South African education policies will be conducted. Henceforth, I shall conduct a policy archaeology by means of the three regularities and its criteria, *governmentality*, *managerialism* and *performativity* to explore the following research question: **what innovative perspectives regarding teacher autonomy and professionalism may emerge from a policy archaeology of South African education policy?**

4.5 POLICY ARCHAEOLOGY OF SOUTH AFRICAN EDUCATION POLICIES

Key to the work of archaeologists is the exploration that is undertaken and when evidence is found, the meaning of such evidence is interpreted. In terms of this study, I shall conduct a policy archaeology of the NSE, NPFTED and CPTD in three stages: (i) Governmentality and South African education policies; (ii) Managerialism and South African education policies; and (iii) Performativity and South African education policies. During these analyses, innovative perspectives regarding teacher autonomy and professionalism will be explored and elucidated.

Henceforth, I shall commence with a policy archaeology in terms of *governmentality and South African education policies*.

4.5.1 Governmentality and South African education policies

In this section, I shall apply two criteria of governmentality namely *technologies of power* (*supra*: 4.5.1.1) and *practices of the self* (*supra*: 4.5.1.2) to conduct a policy archaeology of stipulations from the NSE, NPFTED and CPTD.

As indicated previously, governmentality explores processes of subjectivation (that is, formation of governable subjects) by calling into question aspects of who can govern, what governing is and what or who is governed and how (Foucault, 1991: 103). This notion of governmentality carries a dual function. On the one hand, *governmental technologies of power* are investigated, meaning that an exploration is launched into how teachers are governed by the SAdoE. On the other hand, governmentality also presupposes *governing the self*, referring to opportunities afforded to teachers by the SAdoE to be in charge of their own teaching practices. The afore-mentioned criteria represent the notion of governmentality as a context where power is exerted over teachers whilst they are also afforded an active role regarding their own self-government.

4.5.1.1 Governmental technologies of power

Governmental technologies of power assemble an array of tools that bring together organised strategies in an attempt to govern the life and habits of individuals in an organisation (Rose, 1999: 18). One such strategy, amongst others, manifest as “*transformative capacity aiming to influence and modify the actions of individuals in order to realise certain goals*” (Giddens, 1984: 88). Here, the exercise of power intends to: “*shape, guide and direct the conduct of others*” (Foucault, 1977: 16 and Rose, 1999: 3). Thus, in applying “*transformative capacity*” my position is that, in terms of the NSE, NPFTED and CPTD, power is exerted over teachers in the way that their competencies are modified to fit the aims of the SAdoE.

The three mentioned education policies contain established rules which are illustrative of governmental technologies of power exerted over teachers to transform ways in which they are regarded as competent teachers. My observation is that such established rules are visible in articulations such as:

*“The list of roles is meant to serve as a **description of** what it means to be a **competent teacher**”* (Department of Education, 2000b: Section 3);

*“Providers develop programmes and an institutional ethos which **develop educators** as extended professionals and lifelong learners”* (Department of Education, 2006: Section 34); and

*“To **coordinate professional development activities** with a view to achieving sharper focus and effectiveness”* (Department of Education, 2008: Executive Summary).

I am of opinion that phrases like *“**description**”, “**develop**” and “**coordinate**”* have a transformative agenda. Transformation in this sense hinges on actions to change the conduct and capacity of individuals so as to reconceptualise what teachers should be (*vide*: Karlberg, 2005: 4). For example, the SAdoE provides a list of roles which aims at transforming teacher professionalism in terms of teachers’ knowledge, ability to manage their classrooms and ability to be reflective practitioners, amongst others (Department of Education, 2000b: Section 7). I argue that such transformative acts may be considered hallmarks for developing professional competence in lieu of governmental objectives. Here, I make the assumption that such transformative capacity should lead to improvement of the quality of teaching and learning, more participation in decision making and create willing agents in terms of educational activities.

When South African teachers are governed in as indicated above, I contend that, in terms of governmental technologies of power:

“Teachers are constructed in accordance to governmental procedures and their conduct is articulated in terms of subjected obedience as desired by the SAdoE” (my own articulation).

My articulation is supported by the notion that South African teachers become obedient agents and objects of discipline, because when individuals are engaged in a technology of power as indicated above, such engagement is a form of discipline that is at the heart of competence (*vide*: Reinkraut, Motulsky & Richie, 2009: 12). Teachers become obedient

followers in terms of the policies' intention to cultivate a particular kind of educational agent. I argue that as professionals, they have no voice in terms of how and when their competencies should be developed. Here, teachers' professionalism is not only an attack on their educational abilities, but also an ethical demand: "the right to remain silent". Such demand reveals barriers that may be responsible for obstructing emancipation and freedom in education (Papastephanou, 2001: 75; 82). Consequently, teachers are afforded little or no room to be in charge of their own development, because the margin of their liberty (Foucault, 1988b: 12) is extremely narrowed. It is evident to me that such disciplinary power domination presupposes an overriding of teachers' professional abilities with the aim to be in control of their teaching practices. If South African teachers are obstructed as indicated in the prior views, my viewpoint is that professionalism is sabotaged with respect to participative thinking, performance, competence and skills. As a result, teachers may experience diminished self-worth and self-trust, are less likely to operate as independent educational partners and their choices, actions and agency may be depleted (*vide*: Holroyd, 2009: 322).

I consider the regulatory grammar of transformative capacity in terms of teachers' obedience and conformity as a way to discipline South African teachers as professionals. The exertion of disciplinary power over teachers becomes visible: "*by restricting action to that which is obedient, not prohibitively, but also creatively, productively*" (Clegg, 1998: 41). As I have indicated, "*description*", "*develop*" and "*coordinate*" render South African teachers obedient professionals in terms of the educational objectives of the SAdoE. Thus, because the SAdoE portrays signals for disciplining teachers, that is, how teachers should conduct themselves professionally, I propose *disciplinary professionalism* as a perspective to be probed in terms of teacher professionalism in this country. The proposed perspective in terms of this study may be deemed relevant, because: "*a closer mapping of the social body*" (Foucault, 1977: 78) is still needed. I regard Foucault's view as a novel suggestion to re-theorise disciplinary technologies of power in terms of professionalism, because of a lack of information regarding the mentioned perspective in the academic literature. This perspective, *disciplinary professionalism*, will be deliberated later (*supra*: 4.6.1).

An attempt to discipline professionals may be considered as a form of regulation contributing to: "*ways in which authorities seek to shape the conduct, needs, desires and capacities of individuals to enlist them in particular strategies*" (Dean, 1994: 156). Such strategies are

geared towards a conduct of individuals' relation with the self or practices of the self (Rose, 1996: 135). Thus, whilst governmentality reveals how South African teachers' professionalism is governed by the NSE, NPFTED and CPTD, it also opens opportunities for teachers to experience *practices of the self*. Engaging in *practices of the self*, possibilities are created for teachers to explore opportunities to become autonomous actors of their own teaching practices as well as autonomous interpreters of their teaching experiences (Reichenbach, 1988: 229). Such practices will be deliberated in the next section.

4.5.1.2 Practices of the self

Evident from the preceding section are mechanisms used by the SAdoE to dictate what teachers ought to do, rendering them obedient and compliant professionals. On the other hand, stipulations in the same policies communicate the notion that there are: "*ways in which individuals are allowed to constitute themselves through self-development*" (Rose, 1999: 88). These ways of constituting the self requires certain techniques for the conduct of one's relations and is referred to as practices of the self. Such techniques are articulated by Foucault as: "*a possibility of a new form of right*" (Foucault, 1977: 15) that teachers obtain to govern their own teaching practices. In terms of the prior views, I intend to analyse stipulations from the NSE, NPFTED and CPTD to explore which "rights" are afforded to teachers to exercise practices of the self. The following stipulations from the mentioned policies will be analysed:

*"The educator will mediate learning in a manner which is sensitive to the diverse needs of learners, including those with barriers to learning; **construct learning environments** that are appropriate contextualised"* (Department of Education, 2000b: Section 3.7);

*"This policy is underpinned the belief **teachers are the essential drivers** of a good quality education system"* (Department of Education, 2006: Section 7); and

*"**Enable teachers to develop** professional competences and fulfil their normal employee and professional duties"* (Department of Education, 2008: Section 2).

For me, the “rights” I referred to before the indicated stipulations above, emerge in the use of “to construct”; “drive” and “enable” which imply a position of power in the hands of South African teachers. I speculate that these rights give consideration to the production of teachers as free individuals who are in control of their teaching practices. My speculation is actually confirmed by Littlewood (1996) who asserts that teachers gain: “*an independent capacity to make and carry out choices which govern their actions*” (Littlewood, 1996: 428). Here, the SAdoE creates opportunities for choice in terms of allowing teachers to be the designers (to construct); the facilitators (to drive) and implementers (to enable) of plans relevant to their own development.

Drawing on my teaching experience, I am aware that South African teachers create an interactive learning environment where diverse learners are accommodated and information is easily accessible. In this way teaching and learning becomes shared responsibilities and communication between teachers and learners may improve. As drivers of their own professional development, I suggest that, in terms of practices of the self:

“South African teachers should frequently reflect on their own practices and competences so as to constantly work towards improving the self” (my own articulation).

When teachers make use of opportunities to reflection their teaching practices and attempt to improve themselves, they become liberal individuals and drivers of their own self-directed autonomous development (Gardbaum, 1996: 387). Within this notion, teachers occupy a special position because the SAdoE encourages them to make choice in terms of their teaching practices. In relation to the SAdoE, freedom of choice finds meaning in teachers being allowed to be specialists in assessment, curriculum developers and class managers, amongst others (Department of Education, 2000b: Section 6). Considering teachers’ autonomy in terms of the SAdoE, I argue that when teachers realise the freedom afforded to them, they may act as independent beings. As a result, teachers may be effective in determining their lives in accordance with their authentic selves. In this regard Reich (2002: 90) postulates that: “*there is in man a power of self-determination, independently of any coercion through sensuous impulses*”. Considering this view, I am of opinion that teachers may act autonomously, because they are allowed to think and act in an independent manner.

The way in which teachers obtain the ability to be in control of their own practices resonates with Foucault version of “technologies of the self” which:

“permit individuals to effect, by their own means or with the help of others, a certain number of operations on their own conduct, so as to attain a certain state of wisdom, perfection” (Foucault, 1988: 18).

I interpret the use of “*permit*” as a move by the SADOE to deny teachers complete control of their teaching practices. In fact, I argue that the SADOE is only flexible in allowing teachers to be in charge of their practices. This is in line with the way globalisation allows flexibility in terms of mobilising the subjectivity of individuals and their capacity to govern themselves. Flexibilization allows individuals to co-exist alongside highly refined practices of government (Christie & Sidhu, 2006: 451). Here, I want to draw attention to how the SADOE shows flexibility in terms of affording teachers the capacity “to construct” and “to drive” the quality of teaching by allowing them freedom to govern themselves. Thus, whilst the SADOE direct teachers’ educational practices by specific procedures and techniques, they also create flexible spaces for teachers to be in charge of their practices.

I contend that flexibility in terms of practices of the self is similar to promoting autonomy in teachers to have control over their own affairs. Since the SADOE provide pointers such as “construct” and “enable teachers” for teachers to flexibly utilise autonomy, I reason that room is made for suggesting an innovative perspective like *flexibilised teacher autonomy*. The suggested perspective may be deemed relevant, because flexibilisation presupposes the: “*liberation of individual freedom within a framework of exercising one’s rights*” (vide: Harvey, 2005: 2). I regard Harvey’s (2005) notion as a clear illustration of the freedom individuals may obtain to govern their own affairs. Therefore, *flexibilised teacher autonomy* may be regarded innovative, because there is a lack of evidence regarding the presence of such perspective in the academic literature. This perspective, *flexibilised teacher autonomy*, will be elucidated later (*supra*: 4.6.2).

I want to raise awareness that teachers are not only dominated by disciplinary power in education policies, but that the indication that the three education policies are flexible in enabling South African teachers to govern themselves, is clearly visible (*infra*: 4.5.1.1 and

4.5.1.2). At the same time, when governmentality renders teachers both subordinates and autonomous beings, they are subjected to the managerialist power in South African education policies. Here, managerialism is recognised as a form of governance, because it is meshed with technologies of power and practices of the self (Kolsaker, 2008: 518). Evidence of this can be seen in mechanisms of domination and self-constitution which will emerge as part of the discussion to follow.

4.5.2 Managerialism and South African education policies

The focus of this section shifts to the application of *managerialism as domination* (*supra*: 4.5.2.1) and *managerialism as self-constitution* (*supra*: 4.5.2.2) as criteria of managerialism to conduct a policy archaeology of stipulations from the NSE, NPFTED and CPTD.

Previously in this chapter, managerialism was articulated as a set of legitimising norms by managers to generate particular kinds of governing principles; success measures; structural arrangements and work nodes to the best interest of an organisation (Foucault, 1977: 156). Considering Foucault's (1977), I argue that driving forces which generate particular kinds of individuals manifest in the way humans experience forms of domination or are afforded opportunities for self-constitution.

In the sections to follow, I shall discuss the manifestations of managerialism in terms of managerialism as technology of domination (*supra*: 4.5.2.1) and managerialism as technology of self-constitution (*supra*: 4.5.2.2).

4.5.2.1 Managerialism as technology of domination

Managerialism as technology of domination brings with it a series of mechanism of audit and control by the state and is instituted by senior and middle academic managers (Kolsaker, 2008: 516). Here, audit and control are represented by a set of knowledge, skills and values that guide teachers' professional practices. The purpose of enforcing mechanisms of audit and control is to dominate teachers in terms of what they should do, how they should act and how they should feel in terms of the roles assigned to them (Hilferty, 2008: 162). Notably, I am of opinion that power is embedded in the afore-mentioned mechanism of domination as it is through such action that teachers' professionalism is generated and controlled.

I observe that the NSE, NPFTED and CPTD contain metaphors relevant to how teachers are dominated in terms of what the SAdoE assume them to be. Such metaphors are evident in the following stipulations:

“Competence in a role is assessed, rather than simply the ability to perform a discrete competence” (Department of Education, 2000b: Section 3);

“It seeks to provide an overall strategy for the successful recruitment, retention and professional development of teachers to meet the needs of the country” (Department of Education, 2006: Section 5); and

“A second purpose is to coordinate CPTD activities with a view to achieving sharper focus and effectiveness in the continuing professional development of teachers” (Department of Education, 2008: Section 2).

Metaphors such as *“is assessed”*; *“provide an overall strategy”* and *“coordinate CPTD activities”* secure tight management of teachers’ competences regarding their teaching practices. Here, I become aware of how the indicated metaphors are used in a prescriptive manner to command teachers how to facilitate professional teaching practices in a particular way, that is, the way that the SAdoE is prescriptive in terms of teachers’ practices. For example, South African teachers were, amongst others, not involved in the design of the NSE, NPFTED and CPTD which advocate teachers’ competences in terms of education and teaching in this country. Teachers are seen as mere implementers of afore-mentioned policies and are frequently assessed by means of the *Integrated Quality Management System (IQMS)* (Department of Education, 2005) which serves to be determinant regarding their competence as professionals. Foucault explains: *“individuals are inserted in a fixed space, in which the slightest movements are supervised, in which power is exercised without division, in which each individual is located, examined and distributed... all this constitutes a compact model of the disciplinary mechanism”* (Minoque, 2011: 185). I argue that when the SAdoE exercise domination in this way, teachers are excluded from being actively involved in the design of education.

Resultant from the prior technologies of domination (“*is assessed*”; “*provide an overall strategy*” and “*coordinate CPTD activities*”) is the way in which South African teachers become useful and docile individuals. My viewpoint is that managerialism as technology of domination:

“*Confine teachers to such extent that they become implementers rather than designers and passive listeners rather than active educational participants*”
(my own articulation).

When teachers become submissive as indicated here, they emerge as what Foucault (1977: 82) calls: “*an insufficient use of bodies*”. The effect of such insufficiency is that teachers’ professionalism is minimised.

From the discussion in this section, technologies of domination have penetrated the practice of managerialism in terms of assessment, productivity and achievement of educational outcomes. As a result, I propose that the way in which teachers’ professionalism is subjected to technologies of domination, be named *managerial professionalism*. *Managerial professionalism* is embedded in the belief that discussions about what to teach and how to teach result in the subsequent assessment of teachers professional abilities (Stefanides-Savva, 2012:25). I intend to deliberate *managerial professionalism* as an innovative perspective regarding professionalism (*supra*: 4.6.3), because the academic literature has been silent about this perspective in the South African education policy domain.

Albeit technologies of domination exerted over teachers, managerialism is similarly considered the mode of discipline that communicates the potential of *technologies of self-constitution*. In this sense teachers can learn to become autonomous through spaces created by education policy, even though opportunities for self-constitution is dependent on the situation, context and social environment individuals find themselves in (Peters & Marshall, 1996: 70). In this study, *technology of self-constitution* as the second criteria of managerialism will be probed next.

4.5.2.2 Managerialism as technology of self-constitution

Although managerialism has been explicated as a mechanism of domination in the previous section, it can also be utilised as a *technology of self-constitution* with respect to teachers (*infra*: 4.3.1). As a *technology of self-constitution*, managerialism intends to empower individuals to work upon themselves to release their fully realised potential (Costea *et al.*, 2007: 3-4). Here, empowerment presupposes that individuals may feel positive about their jobs and take responsibility to commit themselves to their profession in an autonomous way.

If Costea *et al.*'s (2007) view is to be considered an educational goal; managerialism contributes to boosting teachers' functionality regarding their educational roles; thus affording possibilities for teachers to be considered the architects of their own teaching practices. In my opinion, self-constitution thus facilitates strategies which empower teachers to use their independence to express their usefulness in schools. I become cognisant of how such strategies are articulated in the NSE, NPFTED and CPTD in the following ways:

*“The educator will achieve on-going personal, academic, occupational and professional growth through **pursuing reflective study and research** in their learning area, in broader professional and educational matters, and other related fields”* (Department of Education, 2000b: Section 3.7);

*“The professional education and development of teachers work best when teachers themselves are integrally involved in it, **reflecting on their own practice**”* (Department of Education, 2006: Section 7); and

*“The underlying principle is that teachers, individually and collectively, have **a high degree of responsibility** for their own professional development and the identification of their own professional needs”* (Department of Education, 2008: Section 1).

I regard strategies like “***pursuing reflective study and research***”, “***reflecting on their own practice***” and “***a high degree of responsibility***” as actions towards self-constitution. Such actions involve: “*the exercise of power on the self, by the self ... which is also a form of submission, as the self, yields to its own power, and its will is articulated with that of the*

world around it in a series of tasks” (Miller, 2012: 271 and Deslandes, 2012: 327). For me, the SAdoE creates space for teachers to be the masters of their teaching practices. For example, teachers plan their educational programmes, evaluate their practices by using their own knowledge and obtain new knowledge to improve their teaching processes. As such, I argue that teachers are encouraged to think about themselves, add value to themselves, improve their productivity and strive for excellence. Teachers thus take “*care of the self*” (Miller, 2012: 275) and in so doing contribute towards the constitution of the self.

Consequently, teachers cultivate self-interest, promote self-reliance and become the entrepreneur of the self. This implies that teachers become the bearers of human capital, meaning that they have empowered themselves through the acquisition of skills, abilities and knowledge (Čeplak, 2012:1094). In managerial terms this signifies an attempt by teachers to invest in the self. I contend that in terms of such managerial investment, managerialism as self-constitution may be articulated as:

“A policy strategy that aims to empower teachers to be able to do things for themselves, rather than to depend on others” (my own articulation).

Articulated as above, I hold the view that self-constitution may be regarded as an effort by teachers to take responsibility for being autonomous in terms of their teaching practices. Foucault asserts that such responsibility may be an attempt to develop and transform oneself so as to attain an autonomous mode of being (*vide*: Foucault, 1997a: 282). Explaining himself, Foucault indicates that when one takes responsibility for one’s self-constitution, one engages in practices of freedom. When teachers engage in such practices of freedom, I suggest that it be called *responsibilised teacher autonomy*, because they take up the responsibility to be the masters of their own development. The suggested perspective is not a familiar concept in the academic literature, therefore, I intend to probe *responsibilised teacher autonomy* later in this chapter (*supra*: 4.6.4).

The dual function of managerialism displayed in the three South African education policy in a globalised context involves measures of accountability and at the same time produces teachers who are responsible for their teaching practices in this country. In Foucauldian terms: “*This kind of management has become inescapable – part of everything we do*” (Foucault, 1979: 223). Thus, whilst managerialism demonstrates constraints regarding

teacher autonomy and professionalism, it also marks the potential for teachers to act as independent but responsible educational agents. Such action is correspondingly regarded as a move in the direction of performativity. Complementary to managerialism, performativity makes teachers responsible for their teaching performances as well as for the performances of others (*vide*: Ball, 2012: 19). In this perspective of performativity, teachers occupy a position where their identities are implicated by articulations in education policy, amongst others. Such implications are explored in the next section.

4.5.3 Performativity and South African education policies

In this section, the application of *the act as a regularity creates a performance of identity* (*supra*: 4.5.3.1) and *to modify their identities through the act of regularity* (*supra*: 4.5.3.2) as criteria of performativity will be probed.

Performativity denotes pliability, responsiveness and a human capability for active self-involvement in education. Deemed a powerful policy technology that is at work at all levels of education, performativity is a mode of regulation that employs judgments, control, attrition and change with the aim of encapsulating the worth of an individual within a field of judgement (Ball, 2003: 216). Burgeoning with performativity in terms of its prior modes of regulation, two characteristics, amongst others, may be deemed significant. First, performativity acts as a regularity that creates a performance of identity (*supra*: 4.5.3.1), meaning that is responsible for a certain kind of identity formation. Second, it affords individuals opportunities to modify their identities through the act of regularity (*supra*: 4.5.3.2). These two criteria of performativity will be utilised to conduct a policy archaeology of stipulations from the NSE, NPFTED and CPTD. These criteria represent the notion of performativity where the identity of the professional teacher is curbed, but also where teachers enjoy prospects of contributing towards their own identity formation.

4.5.3.1 The act of regularity creates a performance of identity

Within the context of performativity, *the creation of a performance of identity* constitutes the reinvention of teachers as professionals whose performance and productivity must constantly be audited so that it can be enhanced (Ball, 2012: 18-19). As such, “*a performance of identity*” is sustained through acts that are performative in the sense that the essence of

identity formation are fabrications manufactured through discursive means. Such discursive means can be found in education policy in terms of the way policy speaks about professionalism.

For me, the above views regarding performativity are echoed in discourse in the NSE, NPFTED and CPTD. Such discourse is articulated in the following ways:

*“Before designing a learning programme it will be necessary to **establish the particular nature of the clients** and which qualification the learners are to be prepared for”* (Department of Education, 2000b: Section 3).

*“The objective of the policy is to achieve a community of competent teachers dedicated to providing education of high quality, **with high levels of performance as well as ethical and professional standards of conduct**”* (Department of Education, 2006: Section 2); and

*“The system **promotes individual professional growth** of educators”* (Department of Education, 2008: Section 1).

From the indicated discourses, it flows naturally that teachers adapt to be different kinds of people (with a different kind of identity) who ultimately become unrecognisable to themselves. It is within the prior notion that “*a performance of identity*” acquires meaning in terms of teachers’ sense of the self, their knowledge and beliefs, dispositions, interests and orientation towards their work (Drake, Spillane & Hufferd-Ackels, 2001 in Jansen, 2001: 242). An understanding of identity is a manner of when, where and how one is and it signifies the notion that identity is not stable.

However, although identity is not a fixed construct, the SAdoE uses its superior power to claim that identity can be interpreted as stable. This is clearly the case in the use of “*to establish the particular nature of clients*”; “*high levels of professional conduct*” and “*promotes individual growth*”. I speculate that the SAdoE is either judgmental in terms of what kind of individuals teachers are or it is assumed that a particular construct of identity is considered a form of universal applicability. Whatever the case might be, I strongly argue that the mentioned discourses renders teachers docile in the sense that they have no say in

how they should be perceived by the SADOE. This kind of discourse imposed upon teachers an identity may not be voluntarily, but its performative nature opens possibilities for teachers to be judged, controlled and changed. The indicated discourses above bring identities of teachers into being and form the objects of which they speak through the practices they determine (Jeffrey & Troman, 2009: 4). As such, I hold the view that the mentioned discourses imply that teachers may question how they feel about themselves, doubt their competence and they may be uncertain about their role in curriculum processes, amongst others. Furthermore, teachers engage in voluntary compliance, implying that teachers become loyal and committed servants of the education system. (Jeffrey & Troman, 2012: 198). When teachers' identities are regulated in ways as construed above, teachers perform willingly to requirements set out by the SADOE. Thus, I consider it fair to assume that:

“The act of regularity creates a performance of identity that requires from teachers to perform in such a way that their identity formation is linked to the educational objectives of the SADOE” (my own articulation).

Stemming from my prior articulation teachers' doing (practices, responsibilities, functions and conduct, coupled with their being identity) is part of the performative expectations of the SADOE. When identity formation is driven in a performative manner, teachers' professionalism is regulated by regulations involved in the process of teaching practices. This brings me to the supposition that, if professionalism is regulated in a performative way, such action may be named, *performative professionalism*. Professionalism in terms of performativity designates the extent to which teachers, under performance led regimes, are produced for particular effects and their sense of identity is altered (Jeffrey *et al.*, 2012: 196). In view of this notion, I intend to explore *performative professionalism* and how it regulates teacher identity in South Africa. There is an absence of information about the indicated perspective in the academic literature which substantiates my view that *performative professionalism* and as such I deem an exploration into this perspective as relevant.

Although teachers' identities are regulated, I become aware that performativity also suggests the possibility of teachers becoming individuals who intercept such subjectivating processes to constitute a different kind of identity of the self. Here, teachers are placed in a position to act upon themselves, that is, they use opportunities *to modify their identities* to perform as

different kinds of human subjects (*vide*: Kipnis, 2011: 289). The *modification of identity* amidst performativity will be probed in the next section.

4.5.3.2 Modifying the identity of the self through the act of regularity.

Ball (2003: 224) asserts that teachers can react to the rigours of performativity in a creative manner which implies that a plurality of selves may be realised. The realisation of the self is dependent on a theorising subject, meaning that one's identity is dependent on procedures that re-signify the theoretical positions that constitute an individual's identity. Therefore the claim that identity formation is not absolute or fixed definitively. Interpreting Ball (2003) here, I argue that possibilities exist in which teachers are to be involved in their own identity construction. My argument is substantiated by stipulations in the NSE, NPFTED and CPTD which emerge in the following ways:

“The educator will consider a range of possibilities for action, makes considered decisions about which possibility to follow and to perform the chosen action” (Department of Education, 2000b: Section 3);

“Teachers take charge of their self-development by identifying the areas in which they wish to grow professionally” (Department of Education, 2006: Section 2); and

“The policy acknowledges the effective participation of teachers in PD activities” (Department of Education, 2008: Section 2).

Akkerman & Meijer (2011: 312) asserts that it may be through a process of narration that teachers are able to construct their identity. Such narration finds substance in “*a range of possibilities for action*”, “*identifying the areas to grow professionally*” and “*acknowledges the effective participation of teachers*”. My opinion is that the prior discourses position teachers to do something in terms of their identity construction. For instance, whilst the SAdoE admits to teachers' involvement, they (teachers) are able to use their freedom to reflect on their teaching practices, evaluate the pedagogical roles they play in education and put them in charge of their professional development. The autonomy that teachers enjoy here is regarded a performative act geared towards a realisation of a self-formed identity within

already pre-formed interests of the powerful (Strain, 2009: 79). In terms of the prior statements, it appears to me that to modify the identity of the self through the act of regularity:

“The SADOE enables teachers to move beyond educational marginalisation to a space of self-belief and self-confidence where they are seemingly in charge of their teaching practices and self-development” (my own articulation).

Therefore, teachers are able to create own identities, explore personal, social and cultural aspects for identity formation and examine the effect of power relations on their identity formation. When teachers have autonomy to choose which aspects of their identity they value, they portray a more positive attitude towards their work, participate openly in decision making and build a sense of the self (O’Connor, 2008: 120). As such, teachers’ role would include the freedom to decide not only how to teach, but also what to teach. Equally, teachers obtain the freedom to decide how professional development is going to take place. Such freedom would be good for teachers’ intrinsic motivation. Lamb (2011: 71) explains: *“people need to have control over what they do, be sufficiently able to do it, and have the opportunity to relate it to other aspects of their lives”*. Thus, I argue that if teachers enjoy freedom as articulated in the three South African education policies, they obtain a voice which they can use to act in an autonomous way.

I am of opinion that each opportunity teachers get to be in control of the construction of their identity, autonomy is performed in a unique way. One should bear in mind that a performance of identity and identity formation are fluid and shift from moment to moment and context to context. For instance, the three South African education policies within a globalised context create opportunities for teachers to construct images of the self and possibilities for an addition to the authentic self within a field of power relations. When the modification of one’s own identity construction happens in such an autonomous way, I suggest that such action be named *performed teacher autonomy*. I argue that performativity, as a mode of identity construction amidst globalisation, can enable South African teachers to escape from regulatory regimes of conformity to become the selves they picture to be. Since the academic literature is silent about the meaning of *performed teacher autonomy*, I intend to probe this perspective in this chapter (*supra*: 4.6.6).

During analyses of the NSE, NPFTED and CPTD, I took some time in exploring how teacher autonomy and professionalism are implicated in the mentioned policies. In doing so, I analysed education policy discourse by means of *governmentality, managerialism and performativity*. By applying the prior regularities, I was able to break from previous meanings and propose innovative perspectives of the discourses under study. I regard the proposed perspectives as innovative, because it is qualitatively different from existing meanings (*vide*: Barnett, 1953: 7) that could be found in the academic literature. Subsequently, I shall provide an explanation of my claim, that the perspectives are to be regarded innovative, in the next section.

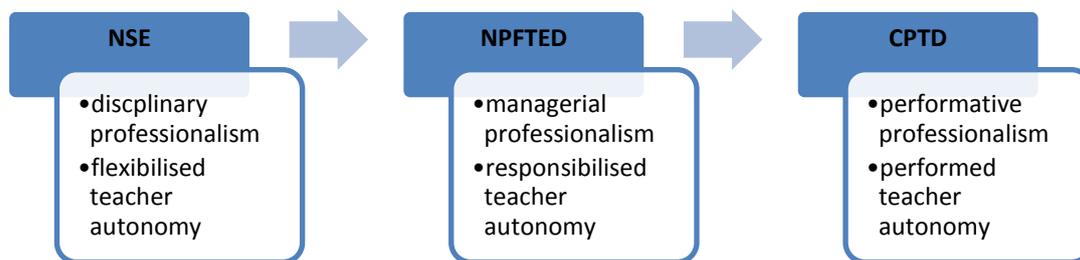
4.6. INNOVATIVE PERSPECTIVES REGARDING TEACHER AUTONOMY AND PROFESSIONALISM

In the previous sections (*infra*: 4.5.1.1- 4.5.3.2) I proposed innovative perspectives regarding teacher autonomy and professionalism. Guided by postmodern deconstruction as my research methodology, the claim of innovative perspectives is not far-fetched. Postmodern deconstruction aims at breaking the borders of meaning by allowing the researcher to reconstruct knowledge in a new order (Boshoff, 2007: 26). This links to “*innovation*” in the sense that one integrates new knowledge with existing knowledge in order to reconstruct a frame of reference in a new way.

There are, of course, many descriptions of teacher autonomy and professionalism already available in the academic literature. For instance, many see teacher autonomy as freedom to choice and professionalism as a form of strict accountability. Thus, during this research, I work with the assumption that the search for innovative perspectives would be more than merely an affirmation of already existing meanings of the discourses under study. I intend to analyse the proposed innovative perspectives to explore what meanings it may denote regarding teacher autonomy and professionalism as articulated in the NSE, NPFTED and CPTD. In the words of Derrida (1992: 9-10): “*it is only through our encounter with the singularity of the other, with the otherness of the other, that we can further our understanding by reaching out to the impossible*”. Such outreach can be thought of inventionalism, because, it is the very experience of the impossible which makes invention possible (*vide*: Caputo, 1997: 42).

Thus, from a postmodern deconstruction frame of mind and applying De Klerk's regularities for a policy archaeology, I was able to think again and fresh (*vide*: Biesta, 2001: 34) at constructing innovative perspectives regarding teaching autonomy and professionalism. Consequently, from the analyses of the NSE, NPFTED and CPTD, the following innovative perspectives regarding teacher autonomy and professionalism emerged (figure 4).

Figure 4: South African education policies and the emerged innovative perspectives



I consulted ERIC, Academic Search, Africa Wide (incorporating South African studies, Humanities International Complete, Humanities International Index and MasterFILE Premier) to determine if the above perspectives are indeed innovative. I found no evidence in the academic literature where these perspectives have been constructed and explicated in a policy archaeology of South African education policies in a globalised context. Therefore, these innovative perspectives may contribute directly to the knowledge corpus in terms of the discourses regarding teacher autonomy and professionalism which have undergone considerable changes due to the influences of globalisation (*infra*: 1.3).

Subsequently, the proposed innovative perspectives will be probed.

4.6.1 Disciplinary professionalism

In this section I explore how *disciplinary professionalism* may have emerged in previous research initiatives as well as how the mentioned perspective is articulated in the NSE, NPFTED and CPTD.

The closest use of disciplinary professionalism is enunciated in an article, “*The appeal of professionalism as disciplinary mechanism*” where Fournier (1999) uses “*disciplinary*” and

“*professionalism*” as separate constructs. The appeal to professionalism aims to regulate the conduct of employees through the articulation of competence (Fournier, 1999: 282). In explaining herself, Fournier (1999) relates the meaning of professionalism as disciplinary mechanism to Foucault’s notion of disciplinary power. Not only does disciplinary power control professionals’ actions, but they (professionals) become easier to be controlled. To illustrate, professionals are constantly under scrutiny, have to endure humiliation and have no voice in decision making (Roberts, 2005: 623). Attempts are not only made to normalise teachers’ practices, but also to create desired dispositions in line with the institution teachers are part of.

Apart from the prior views, I found that disciplinary power becomes visible in South African education policy in a globalised context in terms of how the SADOE “*prescribes norms and standards*” (Department of Education, 2000b: Section 1); “*equips teachers to undertake their essential en demanding tasks*” (Department of Education, 2006: Section 1) and “*facilitates the process of continuing professional development*” (Department of Education, 2008: Executive Summary). I become cognisant of how the prior educational initiatives not only aim at governing teachers’ professional actions, but also how the SADOE controls teachers to the extent that they are disciplined to act in line with the objectives of the department of education. For instance, “*prescribes*”, “*equips*” and “*facilitates*” are disciplinary in nature in so far as South African teachers are compelled to be frequently involved in professional development activities. Such activities include, amongst others, attending training workshops, participation in teacher networks as well as designing and executing school improvement projects (Department of Education, 2008: Section 2). In this instance, the act of disciplinary professionalism emerges in teachers being assessed and awarded professional development points for a three-year cycle. When teachers are disciplined in this way, the purpose would be to ensure: “*a new kind of teacher through new forms of knowledge and a reworking of the theory of the subject*” (Foucault, 2000b: 3).

In terms of the SADOE, I become mindful that the creation of a new kind of teacher resonates with a purpose of the CPTD which is to: “*empower teachers to re-affirm and consolidate their professionalism*” (*vide*: Department of Education, 2008: Section 2). Through such governmentality, the SADOE uses education policy as disciplinary power to subject teachers, as professionals, to the governance of the state. When this happens, I propose that ***disciplinary professionalism*** in terms of the NSE, NPFTED and CPTD may be articulated as:

A technique of power that serves as governmental route that subjugates teachers by turning them into objects that need to be disciplined in order to constitute their professionalism (my own innovative conceptualisation of disciplinary professionalism).

I consider my conceptualisation in tandem with Foucault's (1978) "*conduct of conduct*" in the sense that disciplinary professionalism possibly operates in at least two ways. First, one of the primary aims of discipline is to fix (Allan, 2013: 223). Here, the SADOE enforces disciplinary professionalism in terms of: "*demonstrated ability*"; "*an understanding of knowledge and thinking that underpin actions taken*" and "*reflexive competence*" (Department of Education, 2000b: Section 3). I argue that the SADOE's intention "*to fix*" finds meaning in teacher regulation through measures of professional development terms of their competencies as educational agents. Second, discipline regulates movement (Allan, 2013: 223). The SADOE aims to: "*achieve a community of competent teachers dedicated to providing education of high quality*" (Department of Education, 2006: Section 2.5) and "*coordinate professional development activities with a view to achieving effectiveness*" (Department of Education, 2008: Section 2.2). It is clear to me that the prior disciplinary acts provide a space in which teachers are inserted in a fixed position where their every movement is supervised so as to regulate their professional teaching competencies. Disciplinary professionalism thus operates according to a principle of complete reconstruction, seeking to shape teachers in terms of pre-established norms. Under the sway of such disciplinary power, teachers are subjected to a complex ensemble of techniques of sovereignty, discipline and government so as to behave in ways in which the ones in power (the SADOE) wish them to.

Crucial in terms of the preceding, I ask the question: ***what does disciplinary professionalism do to South African teachers?*** It is my contention that disciplinary professionalism is used to explore, brake down and rearrange teacher competencies to create compliant subjects. It is as if teachers become:

"the obedient subject, the individual subjected to habits, rules order, an authority that is exercised continually around and upon him, and which he must follow to function" (vide: Foucault, 1975: 129).

I argue that such amenability, as indicated above, turn South African teachers into docile bodies – individuals that are subjected, used, transformed and improved so as to be considered professionals. Consequently, teachers become examined subjects whose professional practices are monitored to regulate whether they are doing what is expected from them. I am of opinion that disciplinary professionalism not only normalise certain behaviours to support the educational norms of the SAdoE, but it also produces a platform that may enhance the process of governmentality. This means that teachers are subjected in such a way that they eventually conform to normalised standards of the SAdoE.

Disciplinary professionalism should not be considered a perspective functioning on its own, because it extends governmentality to a notion of flexibility. Through disciplinary professionalism, South African teachers are permitted to affect their own development, by their own thought and through their own conduct (*vide*: Foucault, 2007: 154). When this happens, there is a move in the direction of post-disciplinary power in the sense that, although subjected to control, teachers are allowed a flexibilised form of autonomy to regulate their own development (Fraser, 2003: 165). I previously proposed that such form of autonomy be called *flexibilised teacher autonomy* (*infra*: 4.5.1.2) and henceforth the mentioned innovative perspective will be deliberated.

4.6.2 Flexibilised teacher autonomy

In this section I shall first explore if information regarding *flexibilised teacher autonomy* can be found in existing academic literature after which the mentioned proposed perspective, as articulated in the NSE, NPFTED and CPTD, will be probed.

The academic literature is silent about perspectives relating to flexibilised teacher autonomy. What I found interesting, however, is the use of flexibilisation as: “*a liberal rule that rediscovers freedom as a technical modality*” (Joseph, 2010: 228). In this perspective, freedom is flexibly applied so that professionals are positioned as capable and autonomous individuals. Individuals become active agents who are obliged to enhance the quality of their lives through their own decisions. In this sense, individuals care for themselves, govern their own affairs and affect the outcomes they want to achieve (Fraser, 2003: 168). Interestingly to me is how flexibilisation in terms of “*obliged*” signifies an absence of complete freedom. I

suspect that individuals act as free beings in response to flexible opportunities afforded to them in lieu of organisational demands. For instance, individuals are rendered flexible opportunities to do things for themselves, through an acquisition of competencies such as communication and problem-solving skills.

The prior views, in terms of South African education policy in a globalised context, relates to possibilities for South African teachers to accelerate autonomous growth in a flexible way. My contact point with flexibilised teacher autonomy lies in the supposition that the SAdoE may be malleable in terms of how teachers may conduct themselves and what kind of individuals they may become. For instance, while the NPFTED enables teachers to continually enhance their professional competence (Department of Education, 2006: Section 1), the CPTD initiates its contribution to responsible autonomy and confidence of teachers (Department of Education, 2008: Executive Summary). In both instances the SAdoE portrays flexibility through the maximization of teachers' capacity to be in charge of their own professional growth. In Section 50 of the NPFTED I came across a stipulation that gives a portrayal of the flexibility of the SAdoE. In the mentioned section, the SAdoE pledges that it: "*will enable teachers to become less dependent on outside agencies and more able to become responsible for their own professional development*" (Department of Education, 2006: Section 50). When this happens, teachers are afforded freedom to make discretionary decisions consistent with the educational aims of the SAdoE. Therefore, it is my contention that when teachers act on the decisions they have made, they then may be regarded the governors of their own teaching practices.

In terms of the flexibility afforded to South African teachers as delineated above, I suggest that *flexibilised teacher autonomy* in terms of South African education policies be articulated as:

An opportunity to flexibly utilise one's autonomy to make choices regarding one's teaching practices and act on the freedom that such opportunities may bring (my own innovative conceptualisation).

Particularly, the above conceptualisation holds opportunities for South African teachers to enjoy educational options to act as autonomous individuals. Thus, not only are teachers to be considered mere reflections of the educational intensions of the SAdoE, but it seems that they acquire flexible opportunities to work out who they are and calibrate themselves in

relation to where they should be (*vide*: Leung, Yip, Huang & Wu, 2012: 14). The prior view brings some comfort to my mind, because I realise that teachers' freedom and autonomy are not entirely impinged by the SADOE. As such, I contend that flexibilised teacher autonomy calls for self-governed development through the establishment of a competent teacher workforce which may be attractive for governing teachers and their educational practices in South African education. As Rose (1999: 142) proclaims: "*the state gives way to the enabling state*", meaning (in terms of this study) that the SADOE exercise flexibility in enabling teachers to be in control of their practices.

In terms of the prior discussion, I regard it critical to ask the following question: ***what possible implications does flexibilised teacher autonomy hold for South African teachers?*** I believe that *flexibilised teacher autonomy* fashions a concept of teachers as the owners and creators of their own capacity. Such flexibility can be observed when teachers are afforded initiatives in diagnosing their educational needs, formulating teaching goals, identifying human and material resources for teaching as well as choosing and implementing appropriate teaching strategies. When this happens, the logic of flexibilisation becomes visible in the sense that: "*in enlisting individuals as agents of self-regulation, it fosters their autonomy as a means to their control*" (Fraser, 2003: 165). Thus, although teachers are subjected to the rules of the SADOE, they are simultaneously enabled to move beyond the policy rules to be in control of their work. Reflecting on the prior views, I argue that teachers would become involved in a process of autonomisation, meaning that they may feel more empowered to take charge of their own course of autonomous action (*vide*: Lamb, 1998: 14-15).

What I deduce from the above perspectives is that *flexibilised teacher autonomy* aims at fostering self-regulating individuals, although teachers remain answerable to the SADOE. When this happens, managerialism becomes part of the grammar of governance. Managerialism, as a postmodernist approach to governance, becomes significant because its values, practices and theories are exposed in the lives of professional individuals (*vide*: Foucault, 1982: 221). I argue that the prior aligns with *managerial professionalism* which I proposed as innovative perspective (*infra*: 4.5.2.1). I base such alignment on an understanding that, although teachers are enabled flexibility in exercising autonomy, professionalism seems to be geared towards management processes articulated in the three education policies of the SADOE.

Managerial professionalism will be delineated next.

4.6.3 Managerial professionalism

The main focus of this section is to explore managerial professionalism as articulated in the NSE, NPFTED and CPTD. First, I shall explore existing knowledge regarding managerial professionalism in the academic literature after which the mentioned proposed perspective will be probed.

In 1976, William Haga asserts that managerial professionalism refers to: “*an attempt by managers to mould their subordinates’ official job descriptions according to their perceptions of what the subordinates were already doing on their own initiative*” (Haga, 1976: 345). I interpret Haga’s (1976) view twofold. First, individuals are positioned as controlled subjects in so far power to control emerges in the use of “*mould*”. The implication of such controlling mechanism is that employees become compliant workers in the organisation that have to abide to the rules imposed upon them. Second, “*mould*” is also used as a form of empowerment in terms of further the development of what individuals “*already doing on own initiative*”. The idea would be to help individuals to become more competent in terms of their job description (Dion, 2011: 64).

Although managerial professionalism has been probed by international scholars as indicated above, it appears that the academic literature in South Africa is silent regarding meanings of the mentioned perspective. A South African scholar, Steyn (2002), conducted research on “*managerialism*” and “*professionalism*” as separate constructs focusing on schools principals’ professional obligation to manage schools within a futuristic perspective. In this sense the idea would be use awareness, involvement and creative thinking to manage schools in a professional manner (Steyn, 2002 in Botha, 2004: 242).

Unlike Steyn’s (2002) futuristic view of “*managerialism*” and “*professionalism*”, I contend that managerial professionalism is interested in shaping individuals’ conception of what it means to be a professional in charge of managing their own practices. Of significance is the notion that professionals are supposed to possess academic knowledge and are continually trained to improve their teaching and managing skills, whilst space is also created for research on one’s own work (Winter & O’Donohue, 2012: 343). Considering the prior view

as a prerequisite of managerial professionalism, I found that the SADOE is offering teachers opportunities to be professional who manages their own practices. For example, teachers are encouraged to strengthen professional growth through reflective studies and research (Department of Education, 2000b: Section 3). Thus, in terms of the prior views, I suggest that managerial professionalism is articulated in the NSE, NPFTED and CPTD in the following way:

A managerial technology can be considered as a way to instigate professional norms, through opportunities for teachers, to manage the direction of their teaching practices and development (my own innovative conceptualisation).

Considering the above conceptualisation, in activating opportunities for teachers to be professional managers, they may claim ownership of professional activities to be undertaken and hence, the managers of their own professional growth (Department of Education, 2008: Executive Summary). As such, I argue that the SADOE opens space for teachers to carry out actions and tasks as loci of improving their abilities to manage their own professional growth. Stipulations in the SADOE thus give substance to the notion of *managerial professionalism*; because teachers' managerial abilities are underscored by the way they take charge of their professional development. In this case, I suggest that teachers may feel that they are qualified professionals in instructional processes, have a considerable amount of acquired specialised knowledge and they manoeuvre their learning processes to their own choosing (*vide*: Pearson & Moomaw, 2005: 42). When this happens, teachers may establish themselves as professionals able to engage in self-directed teaching practices so as to be the managers of their own professional development.

Although South African teachers have been organised along managerial lines, they are afforded development opportunities to grow professionally in respect of their educational practices. Thus, in the context of *managerial professionalism*, the SADOE also calls upon teachers to act as responsible individuals to apply management techniques to themselves. Here, responsibility implies that teachers cultivate a sense of self-reliance, meaning that they become involved in empowering themselves so as to be in charge of their own teaching affairs. I am of opinion that such responsibility manifests in the three South African education policies through an intensification of regulation in terms of teacher autonomy.

Previously in this chapter (*infra*: 4.5.2.2), I referred to this kind of responsibility as *responsibilised teacher autonomy*. This perspective will be elucidated next.

4.6.4 Responsibilised teacher autonomy

In this section I explore the proposed innovative perspective, *responsibilised teacher autonomy*. First, I shall briefly probe how the mentioned perspective might have been used in the academic literature previously and then discuss how it is articulated in the NSE, NPFTED and CPTD.

Whilst reading articles and search in book chapters, the closest relation to the aforementioned concept is the use of “*responsibilisation*” by Hofmeyr (2011). The author articulates *responsibilisation* as strategies which aim at holding staff members responsible for their performance as if they (staff members) are independent agents in an organisation (Hofmeyr, 2011: 23). For me, the use of “*as if*” signifies that *responsibilisation* may be considered to be misleading. My point is that, although staff members seem to engage willingly and are in control of their practices, they are actually held hostage by the demands placed on them in the workplace.

In his study, Adendorff (2010) posits that “*responsibilisation*” refers to: “*individuals as free subjects in particular circumscribed ways, encouraging them to be active in their own self-government*” (Adendorff, 2010: 23). When individuals respond to such *responsibilisation*, they obtain autonomy to be the masters of their own development. In fact, autonomy should be conceived as a condition of mastery over our choices and actions, a condition that individuals choose to maintain (Guyer, 2005: 125-126).

My consideration is that teachers should not only be *responsibilised* to re-articulate educational imperatives as conditions to control their teaching practices. Rather, *responsibilisation* assumes that teachers should be held responsible for the outcomes of their own practices (Brown, 2013: 1) as might be the case in the NSE, NPFTED and CPTD. In terms of Brown’s (2013) view, I suggest that teachers are positioned to engage in professional development choices so as to make sense of their roles in education. For example, South African teachers have to pursue opportunities to improve their competences through reflective study (Department of Education, 2000b: Section 3) and they are

responsible for their own professional development (Department of Education, 2006: Section 7 and Department of Education, 2008: Executive Summary). Here, teachers' responsibility becomes a moral obligation in terms of the exercise of own judgement and the making of independent choices. A moral obligation assumes that individuals (also teachers) recognise their obligation to obey the demands of the organisation and exclude any influence from outside their own reasoning (Sullivan, 1994: 47).

As a result, teachers can become autonomous when they are willing to utilise departmental rules in South African education policies so as to enjoy educational freedom in terms of their teaching roles. As such, I argue that *responsibilised teacher autonomy* configures in South African education policy as:

A capability afforded to teachers to become educational participants who are able to be and to do amidst those managed processes by which they are guided (my own innovative conceptualisation).

I am of opinion that responsibilised teacher autonomy makes teachers aware of their activities and the world (teaching environment) in which they are situated. Thus, when the SADOE arrange activities for teachers' development (Department of Education, 2008: Executive Summary), teachers should obey educational demands so as to be considered responsible and independent individuals. Not only does the prior imply that teachers possess the ability to make choices, but they also cultivate an awareness of how to make decisions. In this way, I argue that teachers would be able to make decisions which specify fair terms of cooperation. My argument implies that "*responsibilised*" may then be considered as a capacity for a sense of justice, whilst "*teacher autonomy*" may be interpreted as a capacity for a conception for the good.

Notably, if teachers are rendered freedom and responsibility to make choices concerning their own teaching, I assume that they can then be considered autonomous. Teachers are thus positioned as individuals in control of, amongst others, their educational choices, actions and planning. Here, I argue that the value of responsibilised teacher autonomy manifest in human agency and capacity for authentic choice that grounds respect for the self and others. In other words, and echoing Foucault, responsibilised teacher autonomy becomes: "*the basis for accepting rules, and constitutes human beings as juridical subjects; it is what establishes the*

relation with one self and with others” (Foucault, 1997b: 200). Engaging with Foucault’s thought here, I contend that the NSE, NPFTED and CPTD responsabilise teachers to be in control of their own development even though professional standards for such development is defined by the SAdoE; thus rendering them (teachers) autonomous.

The elucidation of responsabilised teacher autonomy in this section may be a step in the direction of explaining teachers’ performance in terms of their professionalism. It is evident that South African teachers are provided with the means to take responsibility regarding their development which plays up against the importance of measurable performance goals of the SAdoE. This opens ways to understand how professional teachers ought to perform professionally in the South African education system, because: “*these policies display performativity – the use of targets and performance indicators to drive, evaluate and compare educational products*” (Ball, 1999a: 1). This is in line with the innovative perspective, *performative professionalism*, which I proposed in a previous section (*infra*: 4.5.3.1) and which I shall discuss in the next section.

4.6.5 Performative professionalism

Performative professionalism as articulated in the NSE, NPFTED and CPTD is analysed in this section. My first endeavour would be to briefly explore how the mentioned perspective has previously been used in the academic literature and then probe how it is articulated in the NSE, NPFTED and CPTD.

An interesting article on “professional performance” reflects the view that the disciplining of employees takes place in order to ensure their productive and compliant conduct (Hodgson, 2005: 58). Within such perspective, professionals not only perform according to a set of rules, but the objective would be to embody rules in the course of action. Contrary to Hodgson’ (2005) article, a more recent study explains professionalism as a particular way of delivering services which mirrors a mode of functional relevance for the relationship between professionals and their clients (Ade-Ojo, 2013: 9). Within this stance, professionals seemingly use their competencies in routine activities during the execution of their professional roles. Thus, whilst serving others, professionals perform within the parameters of standards demanded by policy.

In the South African education context, professionalism in terms of performativity designates the extent to which teachers, under performance led regimes, are produced for particular effects. For instance, “*teachers are required to have knowledge*” (Department of Education, 2006: Section 9) and “*have to perform such knowledge to be considered competent*” (Department of Education, 2000b: Section 9) so as to “*raise the esteem in which they are held by the people of South Africa*” (Department of Education, 2008: Section 2). I maintain that the prior policy discourses constitute the qualities and qualifications by which South African teachers’ professional identities are affirmed. Such identities seem to become visible in teachers’ worth – their worth of themselves – which develops in the context of managerial regulation (Chua, 2009: 160). Consequently, if the SAdoE constitutes teachers’ performance in terms of professionalism as indicated in the prior views, I suggest that *performative professionalism* be articulated as:

A policy technology which makes visible a performance-scripted character of teachers’ identity in pursue of achieving professional performed targets (my innovative construction).

In terms of the above articulation, teachers may be seen as capable and docile – capable in terms of the performative expectation that South African teachers would support the SAdoE, but docile in the emphasis placed on rigid competency parameters prescribed by the SAdoE. It is thus not strange that teachers’ identity is dependent upon structured subjectivities which are not entirely overt in education policy (*vide*: Boucher, 2006: 113). Such subjectivities are, amongst others disguised in workload and professional duties forced upon teachers. Therefore, *performative professionalism* may generate a sense of fear and even self-doubt within teachers. Ball (2003) refers to this as ontological insecurity where fear around whether teachers are doing enough intensifies the marginalisation of the professional (Ball, 2003: 226). In my opinion, such insecurity may further produce a lack of confidence and trust in South African teachers’ capabilities as well as a questioning of their abilities as professionals.

Not only does the preceding discussion signify a reduction in professional trust of teachers, but I speculate that this may also cause little space for an autonomous self. Chua (2009: 162) explains: “*The teacher has no mind or voice of her own apart from the discourse of performativity*”. This view reveals how teachers’ identities are constructed not only by

administrators, boards of education, parents and politicians, but also through their interactions with others. It also exposes the perpetuation of teachers' subordinate status, restrictions regarding their pedagogical choices and places a shadow over their intellectual freedom. However, there is a way to sway things around. Performativity is also considered to be elastic, implying that autonomy is possible in the way teachers are given opportunities to perform as independent educational agents (*vide*: SØreide, 2006: 545). This aligns with *performed teacher autonomy* which I proposed in a previous section (*infra*: 4.5.3.2) and which will be explicated in the next section.

4.6.6 Performed teacher autonomy

This section aspires to analyse *performed teacher autonomy* as articulated in the NSE, NPFTED and CPTD. Before such analysis, I shall briefly explore the use of this perspective in existing academic literature.

A longstanding view of teacher autonomy is articulated in a thought-provoking article as a: “*strong sense of personal responsibility that individuals have and the application of the freedom such responsibility confers*” (Little, 1995 in Badrinathan, 2011: 252). This notion of teacher autonomy seems to instigate performance in the sense that teachers are enabled to make sense of their profession. Teachers blend with the rules of the organisation and use opportunities afforded to them to act in an independent manner. Here, autonomous teachers acquire a new stance from which to think and talk about their work (De Klerk *et al.*, 2012: 272).

However, if teachers are enabled to act autonomously, they have to perform their duties in accordance with the aims and objectives of the educational system they are agents of (*vide*: Foucault, 1980: 98). For teachers to perform autonomously in the South African education context, they: “*will demonstrate an ability to develop a supportive and empowering environment for teaching and learning*” (Department of Education, 2000b: Section 3). Here, South African teachers have to use opportunities for development available to them (Department of Education, 2006: Section 7) in order to behave as free and autonomous beings. For me, autonomy then becomes a performance where teachers use their capacity and power to act the freedom they acquired. This implies that under conditions of performance, authority in terms of teacher autonomy is objectified so that teachers' actions may have

visible outcomes (*vide*: Martin, 2009: 63). As such, I propose *performed teacher autonomy* can be articulated as:

The power to acknowledge one's subject position, adopting a critical stance to one's self in order to perform one's work in an independent manner (my own innovative conceptualisation).

For teachers to perform autonomously they should “*show*” and “*demonstrate*” what they are doing, that is, they have to make transparent what they are enacting in order to make themselves count in the eyes of others (Usher, 2006: 286). This implies that they participate in their own subjectivities as they reflect on policy demands with the intention to develop skills, knowledge and attitudes to be in control of their teaching practices. Teachers then become less docile (Knights & McCabe, 2000 in Skinner, 2012: 4) and when this happens, they are positioned to reclaim autonomy. Thus, whilst being regulated, South African teachers enjoy freedom to perform their teaching practices and participate willingly with regard to their own professional development. For me, it appears as if the SAdoE accommodate teachers to be independent workers and allowing them to make sense of the multiple demands they are subjected to.

The analyses of the six proposed innovative perspectives presented in this chapter (4.6.1-4.6.6) reveal paradoxes in terms of teacher autonomy and professionalism. On the one hand, the NSE, NPFTED and CPTD explicitly places demands on teachers which is directive in nature and to which they have to conform. This occurs by means of standardisation and accountability, amongst others. On the other hand, after analyses of the mentioned three South African education policies, I observed how the SAdoE contributes to teacher autonomy and professionalism in terms of encouraging teacher responsibility, promoting teacher involvement in professional developing processes, allowing for teacher voice and encouraging flexibility in strategies for obtaining goals (*infra*: 4.6.1-4.6.6). When the prior actions manifest in education policy, professional autonomy is encouraged (Jiménez Raya, 2007: 33). Thus, in terms of the SAdoE's actions and drawing on Jiménez Raya's (2007) assertion, I argue that the door is opened for empowering South African teachers regarding professional autonomy.

4.7 TOWARDS *PROFESSIONAL AUTONOMY* FOR SOUTH AFRICAN TEACHERS

In the previous sections I explicated innovative perspectives relating to teacher autonomy and professionalism (*infra*: 4.6.1-4.6.6) and argued how it may be utilised to empower South African teachers regarding their professional autonomy. The reason for such empowerment resonates with the notion that professional autonomy enhances rather than undermines teachers' educational practices by situating them as the primary authors of their own success or failure (Hyslop-Margison & Sears, 2010: 2). Considering Hyslop-Margison *et al's*' (2010) view and preparing myself for the empowerment of South African teachers' professional autonomy (Chapter 5), the following serves as working criteria (figure 5):

Figure 5: Criteria for empowerment

| | |
|---|---|
| Disciplinary professionalism | • <i>A technique of power that serves as governmental route that subjugates teachers by turning them into objects that need to be disciplined in order to constitute their professionalism.</i> |
| Flexibilised teacher autonomy | • <i>An opportunity to flexibly utilise one's autonomy to make choices regarding one's teaching practices and act on the freedom that such opportunities may bring.</i> |
| Managerial professionalism | • <i>A managerial technology which may instigates professional norms, through opportunities for teachers, to manage the direction of their teaching practices and development.</i> |
| Responsibilised teacher autonomy | • <i>A capability afforded to teachers to become educational participants who are able to be and to do amidst those managed processes by which they are guided.</i> |
| Performative managerialism | • <i>A policy technology which makes visible a performance-scripted character of teachers' identity in pursue of achieving professional performed targets.</i> |
| Performed teacher autonomy | • <i>The power to acknowledge one's subject position, adopting a critical stance to one's self in order to perform one's work in an independent manner.</i> |

In view of the prior criteria, the foundation is laid for empowering South African teachers' professional autonomy. These criteria foreground possibilities for South African teachers to:

“Develop as a self-determined, socially responsible and critically aware participant in (and beyond) educational environments, within a vision of education as (inter)personal empowerment and social transformation”
(Vieira, 2006: 23).

As such, considering Vieira’s (2006) view and the criteria for empowerment above (Figure 5), the empowerment of South African teachers’ professional autonomy will be probed in the next chapter.

4.8 CHAPTER SUMMARY

In this chapter I utilised three regularities namely governmentality, managerialism and performativity (identified in Chapter 3) to probe how teacher autonomy and professionalism are articulated in the NSE, NPFTED and CPTD. First, criteria related to the regularities were applied to explore innovative perspectives regarding teacher autonomy and professionalism in the mentioned policies. Second, possible meanings of the proposed perspectives were explicated. A brief summary of the outcomes of innovative perspectives regarding teacher autonomy and professionalism follows:

Disciplinary professionalism: It became evident that the SAdoE aims at disciplining teachers how to conduct themselves professionally. Teachers’ competences are rearranged in a disciplinary fashion so as to become compliant subjects. When this happens, South African teachers are turned into docile individuals that are used and transformed in order to be considered professionals.

Flexibilised teacher autonomy: The SAdoE creates flexible spaces for teachers to be in charge of their practices. For instance, teachers are afforded opportunities for self-regulation which enables them to take charge of autonomous action relevant to their teaching practices.

Managerialism professionalism: Opportunities exist for South African teachers to manage their teaching practices in a professional manner. The NSE, NPFTED and CPTD enable teachers to use their professional knowledge, amongst others, to manage the direction of their teaching practices and professional development.

Responsibilised teacher autonomy: For South African teachers to be considered autonomous they should recognise their educational obligations to obey the demands of the SAdoE. If this happens, teachers are responsabilised to become educational participants amidst the processes by which they are guided in the NSE, NPFTED and CPTD.

Performative professionalism: South African teachers not only enjoy powers and privileges accruing to their positions as professional subjects, but they also become the foci of managerial regulations that impact on their identities. Consequently, teachers' self-worth and their abilities to act as professionals are simultaneously questioned and enhanced.

Performed teacher autonomy: South African teachers are afforded opportunities to observably act autonomously regarding their professional development as well as in the performance of their teaching practices. Teachers, in terms of the NSE, NPFTED and CPTD, acquire a critical stance to perform their work in an independent manner.

Considering a Foucauldian view, I would like to think of the innovative perspectives in this chapter as "*ontology of the self*". Foucault explains that our lives may be considered: "*a philosophical life in which critique of what we are is at one and the same time the analysis of the limits that are imposed on us and an experiment with the possibility of going beyond*" (Foucault, 1984c: 50).

Therefore, I do not regard teacher autonomy to be thought of as mere freedom from control, nor should professionalism be understood as simply educational demands placed upon teachers. Rather, innovative perspectives regarding the mentioned discourses provide ingredients for further development of South African teachers in terms of professional autonomy. For instance, a policy archaeology of the NSE, NPFTED and CPTD revealed that South African teachers are:

- transformed to be considered professionals (disciplinary professionalism);
- afforded flexibility to be in charge of their teaching practices (flexibilised teacher autonomy);
- enabled to manage the direction of their professional development (managerial professionalism);

- responsabilised to act autonomously (responsibilised teacher autonomy);
- becoming performers of self-worth and professional actions (performative professionalism); and
- afforded a stance to perform their work in an autonomous manner (performed autonomy).

The afore-mentioned actions constitute the development of appropriate professional practice within a notion of autonomy. From this perspective, I argue that the development of teachers' professional autonomy (*infra*: 4.7) becomes an innovation necessary to contribute towards a different kind of teacher in the South African education system. Consequently, in Chapter 5, I shall provide edification on how the constructed innovative perspectives may contribute to the empowerment of South African teachers in terms of *professional autonomy*.

CHAPTER 5

EMPOWERING SOUTH AFRICAN TEACHERS REGARDING PROFESSIONAL AUTONOMY

5.1 INTRODUCTION

In this chapter I shall explore possibilities how the innovative perspectives (*infra*: 4.6.1-4.6.6) regarding teacher autonomy and professionalism may be utilised to empower South African teachers concerning *professional autonomy*. The reason for such empowerment resonates with the notion that *professional autonomy* enhances rather than undermines teachers' educational practices by situating them as the primary authors of their own success or failure (Hyslop-Margison & Sears, 2010: 2). After all, empowerment is explained as teacher liberation, meaning that teachers are afforded space to be free from control so as to perform their teaching practices in an independent manner (*vide*: Prawat, 1991: 749). Therefore, I work with the assumption that my endeavours in this chapter may contribute to the development of South African teachers' professional autonomy and the grounding of such autonomy in teachers' professional practices. I argue that in an attempt to empower South African teachers regarding *professional autonomy*, teachers' voices may become a buffer against mere compliance and conformity in education.

By *professional autonomy*, I echo the following words: “*power being placed in the hands of teachers such that they may possess leadership in terms of education policy and decision making regarding their teaching practices*” (*vide*: Raaen, 2011: 628). For me, the prior view denotes two implications. Teachers seemingly obtain a privilege of self-governance (autonomy), but also take responsibility to act professionally (professionalism) according to educational standards in education policy. Of significance, however, is that *professional autonomy* is not a matter of absolute private concern for teachers. Rather, *professional autonomy* is reliant on teachers' connection with their opportunities to oppose power and to challenge standardised regimes in education policy (Foucault, 1983: 65). Considering Foucault (1983) here, I argue that South African teachers are to be empowered and exalted as professionals so as to be able to conduct themselves in a professional autonomous manner.

I want to indicate that my endeavour is to advance innovative arguments regarding professional autonomy, but I would not speak from a finished position. Like Ball (1999), I want to borrow from a writer whose work I greatly admire: “*What I am about to say ought to be taken as ‘propositions’ and ‘game openings’ where those who may be interested are invited to join in*” (Foucault, 1991: 90-91). Already here, I give an indication that my intention is not to limit meaning regarding professional autonomy. Rather, the suggestions I shall propose, should not be seen as grand narratives. Therefore, I intend to associate myself with the view that: “*meaning and essence cannot be easily pinned down*” (Caputo, 1997: 43). As a consequence, the suggestions I am about to propose later in this chapter should not be considered singular perspective in terms of professional autonomy for South African teachers.

To start this exploration, I want to position myself as to how this chapter will unfold. This chapter will develop in the following ways: (i) what constitutes professional autonomy?; (ii) an explication of the link between the innovative perspectives and South African teachers’ professional autonomy; and (iii) probing suggestions for empowering South African teachers regarding professional autonomy.

5.2 WHAT CONSTITUTES *PROFESSIONAL AUTONOMY*?

In this section I aim to answer the question: ***what constitutes professional autonomy?*** The search for answers to the prior question will be in line with the application of the meaning of *professional autonomy* relevant to this research.

In section 5.1, I briefly referred to explications of *professional autonomy* as articulated by Raaen (2011) and Foucault (1983). From the afore-mentioned authors’ views, I come to understand *professional autonomy* as a privilege of self-governance in so far teachers take a stand against mere compliance. This view in mind, I found myself searching for a more comprehensive explanation of *professional autonomy*. I then consulted Hashimoto (2006) who proclaimed that *professional autonomy* came to be known when the *World Medical Assembly’s* (WMA) Declaration of Madrid on Professional Autonomy and Self-Regulation adopted some basic principles during the 39th WMA held in Madrid, Spain, in October 1987 Hashimoto (2006: 125). However, before this time (1987) more emphasis was placed on physicians’ professional independence and discretion, whilst professional freedom was used

in lieu of professional autonomy. Later (in 2011), *professional autonomy* has been expounded as:

*“The professional has the **choice of the means, the method and the procedures in order to realize objectives** of the programs for which he is **responsible**, taking into account the practices and general procedures defined for his action”* (Varjus, Leino-Kilpi & Suominen, 2011: 202).

Unlike different views of professional autonomy in the academic literature, I regard Varjus *et al's* (2011) view as comprehensive, because I am of opinion that it opens possibilities for deeper analysis to explore different meanings of *professional autonomy*. For me, language structures like “*choice*”, “*to realize objectives*”, “*the programs*”, “*is responsible*”, “*the means, practices and procedures*” and “*for his actions*” highlight the very possibility of autonomy for professionals in an organisation. I deem this important, because the prior language structures denote a certain belief, attract regimes of behaviour and adopt rules of conduct through which human beings may be considered professional autonomous individuals (*vide*: Foucault, 1982: 208). In my opinion, three inferences can be made regarding Foucault’s view. First, I argue that when teachers are confronted with “*choice*”, they **independently act** in accordance with what they believe might be of value to their self-formation. Second, I maintain that “*practices and procedures*” may be seen as mechanisms of **authority** that regulate teachers’ behaviour towards a move in a direction of professional autonomy. Third, I contend that “*to realize objectives*” and “*is responsible*” signify teachers’ mode of **accountability** to perform the duties assigned to them and in the process comport themselves to become professional autonomous beings.

I consider the afore-going highlighted phrases, *independent action*; *authority* and *accountability* fundamental, because of power relations prevalent within these language structures associated within professional autonomy. On the one hand, power relations are associated with “*power over*” individuals with emphasis on control, strength and competitiveness, amongst others (Smith, 2003: 36). Here, power functions to ensure compliance and conformity to the rules of the organisation which would leave professionals without independence to be in control of their own practices. On the other hand, power relations are also associated with “*power to*” which accentuates an ability to function independently amidst regulation (Smith, 2003: 36). The latter implies that power relations

aims at empowering professionals, like teachers, in order to promote autonomy. It is the prior notion which I want to place emphasises on, because my endeavour is to put forward suggestions regarding the empowerment of South African teachers with respect to professional autonomy.

Consequently, I want to capitalise on the above indicated characteristics: *independent action*, *authority* and *accountability*, because I believe that it may contribute to an understanding of professional autonomy in terms of this study. In figure 6 below, I assign these characteristics to the indicated language structures above so as to answer the following question: *what constitutes professional autonomy?*:

Figure 6: Assigned characteristics with indicated language structures

| Independent practice | Authority | Accountability |
|--|--|---|
| <ul style="list-style-type: none"> • "choice" • "for his action" | <ul style="list-style-type: none"> • "the means, the method and the procedures" • "the practices and general procedures" | <ul style="list-style-type: none"> • "to realize the objectives" • "is responsible" |

I explain figure 6 in the following way: (i) "*choice*" and "*for his action*" in terms of *independent practices* may be perceived as teachers' willingness, capacity and freedom to take control of their practices (Huang, 2005: 4); (ii) "*the practices and general procedures*" may signify *authority* exerted over teachers, but also as power given to teachers to promote a professional identity so as to advance their professional autonomy (Smith, 2003: 38); and (iii) "*to realize the objectives*" and "*is responsible*" may point to *accountability* as a principal consequence of professional autonomy (Smith, 2003: 39). What I deduce from Smith's view is that accountability not only aims to hold teachers responsible for the quality of work they have to provide, but also ensure that teachers' voices are heard regarding their teaching practices.

In terms of the above authors' explanations, I am convinced that *independent practice*, *authority* and *accountability* contribute to teachers' development. Therefore, I shall next explicate these characteristics to probe how it contributes to the meaning of the concept "*professional autonomy*".

5.2.1 Independent action

My purpose in this section is twofold. First, I wish to explore what I find as prevailing understandings of *independent action* in the academic literature. Against this background, I shall then attempt to explicate its significance in terms of professional autonomy for South African teachers.

The process of becoming independent may be based on one's use of reason. Emmanuel Kant contributes two ideas to the prior line of thinking. First, Kant argues that a propensity for independent action, that is, "*a vocation to free thinking*" is not a contingent and historical possibility (Biesta, 2008: 170). Rather, it should be seen as something that is an inherent part of human nature in the sense that independent action is a form of individuals' existence. Thus, human beings live with a desire to be independent (autonomous). Second, independent action resonates with the idea of a "*capacity to emerge*" (Rancière, 2006: 49). In this view, human beings become autonomous when they, instead of waiting that something should be done to them, take action and do something about the practices in their work with which they are confronted.

Considering the above perspectives, I ask myself what vision of professional autonomy does *independent action* want to advocate. I am of opinion that *independent action* is certainly not merely a right to freedom from control or an ability by professional teachers to exercise such right. Nor is it just about professional teachers using autonomy to make choices concerning their own teaching. It seems to me that professionals do not experience or exercise total independence nor do they function in total isolation. Rather, *independent action*, in terms of professional autonomy, represents the ability of teachers to function independently yet collaboratively with others in schools (Hoyle & Thomas, 2003: 37). Here, professional autonomy means that teachers consult other colleagues, but the results of consultation are at all times under the control and direction of the individual autonomous professional. Considering this view, I contend that, in terms of independent action:

“Teachers may be able to act independently and autonomously, because they are afforded opportunities to determine their lives in accordance with their authentic selves” (my own conceptualisation).

My view suggests that the authentic self and professional autonomy have an essential relation with each other. For me, this implies that professional autonomy can be constituted, on the one hand, by a cluster of related capacities (authenticity conditions). These conditions are centred on identifying teachers’ authentic nature or preferences. On the other hand, I am of opinion that professional autonomy may be constituted by competency conditions that are centred in people being able to effectively live in accordance with certain capacities throughout their lives.

The prior arguments regarding *independent action* within professional autonomy, reminds me of two assumptions in terms of South African teachers’ professionalism and autonomy as articulated in the NSE, NPFTED and CPTD in Chapter 4. First, South African teachers are afforded independent opportunities to enhance their professional competencies and chart their own professional development (*infra*: 4.6.3.5). Second, South African teachers are afforded a professional stance to perform their work in an autonomous manner (*infra*: 4.6.3.6). My argument is that, when South African teachers are afforded independent action as portrayed in my prior assumptions, they may enjoy a range of meaningful life and teaching options from which to choose and to act. In order to act, one must initiate one’s action by exercising one’s power to do so. When teachers act in a professional autonomous manner, they evaluate their motives on the basis of whatever they believe and desire (Bratman, 2003: 156-176). They then went further to adjust their motives in response to their evaluations. For me, this signifies that teachers’ autonomous and professional capacity is strengthened to discern what follows from their beliefs as well as desires and to act accordingly. On the other hand, when teachers act according to their beliefs and desires, they become known as an “autonomous self”. An autonomous self is able to establish guidelines (norms) for directing itself (Wallace, 2006: 165). The ability to direct oneself is rooted in a reflexive, self-mediating capacity. Thus, I argue that professional autonomy not only become a capacity for critical self-reflection for teachers, but also a skill for producing norms and directing themselves by such norms.

My discussion in this section reveals that *independent action*, in terms of the academic literature, can be portrayed as a dimension of freedom distinctive of individuals' role in life (*vide*: Bernauer & Mahon, 1994: 153). This notion is significant in terms of professional autonomy in so far individuals are afforded opportunities to determine their lives in accordance with their authentic selves. I further argue that the prior views resonate with possibilities for teachers to act in a professional and autonomous way as indicated by the three South African education policies analysed in Chapter 4. These views align with previous arguments regarding *performative professionalism* and *performed teacher autonomy* (*infra*: 4.8) which I intend to utilise as criteria to empower South African teachers regarding professional autonomy. Firstly, performative professionalism emphasises teachers' ability to act as performers of self-worth and professional actions, whilst performed autonomy focuses on teachers' capability to perform their work in an autonomous manner (*infra*: 4.8). Consequently, performative professionalism (*supra*: 5.4.1) and performed teacher autonomy (*supra*: 5.4.2), as criteria to empower South African teacher regarding professional autonomy, will be deliberated later in this chapter.

My understanding of *independent action* as an attribute of professional autonomy is that it signifies the demand to teachers to understand and contour their own teaching practices against the background of the rules of the environment they find themselves in. My view is underscored by a notion that *independent action* is much necessary for the development of a free will that is a prerequisite for the formulation of a claim to autonomy (Bothfeld, 2008: 8 and Darwall, 2006: 263). It requires that individuals should have the ability to emancipate from authority structures in the social environment, but also developing authority in relation to their own needs. For me, authority seems to be complementary to *independent action* in two ways. Authority appears to be prescriptive of nature (prescribes what professionals should do and be), but it also seems to guarantee freedom (professionals obtain power to transgress the demands of the educational environment they find themselves in). In this context, I regard authority as a significant attribute of professional autonomy, because it denotes individuals' attempt to become professionally stronger and to combat the regulations that routinize their daily lives in an autonomous manner (*vide*: Lamb & Simpson, 2003: 56). Because of the prior argument, it is evident that authority may be considered an attribute of professional autonomy. Subsequently, I shall next explicate authority to analyse how it contributes to the meaning of the concept "professional autonomy".

5.2.2 Authority

In this section I intend to gain knowledge of existing views of authority in the academic literature. It is also my endeavour to explore how authority contributes to an understanding of professional autonomy.

Authority is associated with how ideas are put into practice (Hall, 2001: 72) and how behaviour or conduct is controlled so as to regulate the people of which it speaks. If the aim of authority is subjectification as indicated in the prior view, I contend that humans are portrayed as individuals being transformed into docile subjects. As Foucault points out: “*the subject is not the speaking consciousness, not the author of the formulation, but in a position that might be filled in certain conditions by various individuals*” (Foucault, 1975: 115). For me, Foucault’s view denotes an enforcement of compliance within a determinate system of already existing norms. What is at stake here for professional autonomy is not only negative issues regarding an individual’s identity and cognition, but seems also to be regarded as diminishing and tyrannical. Such negative views of authority may contribute to a limitation in terms of teachers’ emancipation and freedom in education.

My own teaching experience may be regarded an example in terms of the prior explication. I am quite aware how teachers’ professionalism and autonomy are impaired by authoritative policy expectations of the department of education. For instance, the NSE is prescriptive in terms of what it means to be a competent teacher in South Africa (Department of Education, 2000b: Section 1). Teachers are regulated in terms of knowledge, skills and the roles they have to play in schools. Based on my experience and drawing on South African education policy, my view is that the outcome of such authority is similar to: “*a set of rules that regulate what can and cannot be said, who can speak with the blessing of authority and who must listen*” (vide: Kincheloe & McLaren, 2005: 310). My argument is that teachers become docile individuals who conform to authoritative goals aiming to control them by means of surveying activities.

On the other hand, however, Hanna Arendt asserts that authority creates spaces of freedom that enables individuals (professionals) to perform their practices in an autonomous manner (Arendt, 1977: 275). Contrary to the negative views articulated in the preceding paragraph, I rather associate myself with Arendt’s (1977) view here, because:

“Authority also positions professionals to access power and autonomy to be in charge of their own affairs amidst regulations in a particular field” (my own conceptualisation).

In terms of the above conceptualisation, I am of opinion that authority confers autonomy upon individuals so as to enable them to make decisions regarding their own practices. Autonomous individuals are presumed to have the capacity, the right and responsibility to exercise such authority, because authority becomes a principle of respect for autonomy (McKenzie, 2008: 512). When authority becomes a principle of respect, the aim is to promote individuals’ competence to be act as creative and free beings. In defence of the prior statement I hold the view that individuals (teachers) should become the legitimate source of their authority. My argument is that teachers’ actions should be authorized by the provisioning of space for the expression of their perspectives and competence regarding their work. If such space is to be provided in educational settings, teachers’ professional autonomy becomes: *“a matter of living up to standards that one has for oneself, standards that express one’ conception of who one is and what matters”* (Korsgaard, 1996: 107).

I want to relate the discussion of authority within professional autonomy to two perspectives relevant to South African education policy as has been articulated in Chapter 4. First, authority may be linked to techniques of discipline which prescribed what kind of individuals teachers should be and how they should be transformed to be considered competent practitioners in South Africa (*infra*: 4.6.3.1). When teachers are disciplined by means of authoritative regulation, they enter a field of surveillance that capture and fix them (Foucault, 1975: 189). As such, South African teachers are captured by regulation in the NSE, NPFTED and CPTD to discipline and transform (fix) them so as to be considered professionals (*infra*: 4.8). Second, rather than being mere reflections of the educational intensions of the SAdoE, flexible spaces are opened for teachers to determine who they are and calibrate themselves in relation to where they should be (*infra*: 4.6.3.2). The idea would be to afford flexibility to teachers to be in charge of their teaching practices (*infra*: 4.8) with the aim to foster and promote educational conditions necessary for the development and exercise of autonomy (*vide*: McKenzie, 2008: 514).

My exploration in this section reveals that authority within professional autonomy directs attention to regulations embedded in education policies that governs what South African teachers can say, know and do in terms of educational goals of the SADOE. My view is supported by the notion that authority enmeshes teachers as subjects of discipline and in doing so, they become controlled beings in schools (*vide*: Power, 2011: 43). However, authority also lends itself to a position where teachers acquire a platform to have their views and independent practices taken into account (MacKenzie, 2008: 525). Thus, for me authority signifies a form of *disciplinary professionalism* in the sense that it acts to constitute teachers as a particular kind of professional (*infra*: 4.8), whilst it also acts as a form of *flexibilised teacher autonomy* in so far it attempts to enable teachers to flexibly use their autonomy to make choices regarding their teaching practices (*infra*: 4.8). When autonomy acts in these ways (disciplinary professionalism and flexibilised teacher autonomy), substance is given to my endeavour to probe how the mentioned perspectives may be utilised to empower South African teachers regarding professional autonomy (*supra*: 5.4.3 and 5.4.4).

When authority within professional autonomy is exercised, teachers are also held accountable for the achievement of educational goals. Accountability aims to move individuals to respond to the outcomes of their own practices, but also to be open to the mechanisms of judgement (standards) of an organisation (Hoecht, 2006: 544). The prior view validates accountability as an attribute of professional autonomy, because the quality control mechanisms play a significant role in monitoring and judging professionals' work. It is thus logical that I intend to explore accountability as an attribute of professional autonomy, next.

5.2.3 Accountability

Whilst my intention in this section is to explore ways in which accountability has been explicated in the academic literature, I simultaneously aim at considering understandings thereof in relation to professional autonomy.

A longstanding view in the academic literature offers an explanation of accountability as: “*an exercise of making individuals' practices visible and obliging them to accept judgment on their practices in terms of whether or to what extent it conforms to nationally developed standards*” (Savage & Moore, 2004: 14). The basic premise here is that accountability denotes professional compliance in terms of individuals' commitment to agreed criteria in an

organisation. I suspect that the prior accounts of accountability become managerial tools where organisational standards are used to measure the performance and outputs of individuals. It is as if a professional is subjectified to be “the right person with the appropriate conduct” in terms of the goals of an organisation. I found confirmation for my suspicion in South African education policy which aims: “*to promote the professional development of teachers*” and where teachers are held responsible for their own professional development” (Department of Education, 2008: Section1). Here, accountability puts in place symbolic and regulatory elements of education policy aiming to create a specific kind of teacher (Parker, 2003: 31). For me, regulatory elements in terms of accountability suggest teachers’ commitment to the regulative discourse of the SAdoE. On the one hand teachers’ professional ability to exercise judgement about their work is diminished, whilst they are also encouraged to act on managerial demands to improve their performance. As such, I argue that accountability implies that:

“Teachers become less able to function dependently and that they subsequently become managers of their own teaching practices” (my own articulation).

I argue that the above articulation contributes to enhancing teachers’ professional autonomy. It is as if teachers obtain an ability to use knowledge, skills and values to make decisions regarding their practices and act upon them (Savage *et al.*, 2004: 16). Teachers are afforded such ability in the NSE in the sense that they have: “*to consider a range of possibilities for action, make considered decisions about which possibility to follow, and to perform the chosen action*” (Department of Education, 2000b: Section 3). According to me, the indicated ability stipulated in the SAdoE’s implies that teachers get opportunities to steer their own development and they become more proficient at independently integrating their abilities into their day to day teaching activities. The importance of accountability here is that the professional autonomous teachers obtain opportunities to learn how to direct their own development in terms of the goals of education (*vide*: Korthagen, 2005: 371). In this way, teachers use accountability to manage their teaching practices in a responsible manner in terms of professional codes of practices imposed upon them.

The discussion of accountability within professional autonomy relates to two perspectives relevant to South African education policy which I articulated in Chapter 4. First,

accountability may be linked to how South African teachers are organised along managerial lines, that is, their teaching practices are managed by the SADOE, whilst they are also afforded development opportunities to grow professionally in respect of their educational practices” (*infra*: 4.6.3.3). Here, accountability reduces the teachers’ professionalism in the sense that they are monitored to behave in desired ways (Hoecht, 2006: 550). On the other hand, teachers are matured to organise themselves to fit the practices prescribed by management (Davies & Bansel, 2010: 7). Second, the NSE, NPFTED and CPTD attempt to persuade teachers to be in control of their own development even though professional standards for such development is defined by the SADOE; thus rendering them autonomous (*infra*: 4.6.3.4). In this sense, emphasis is placed on self-empowerment and self-help based on opportunities for teachers to take responsibility regarding further education and the development of skills (Peters, 2001: 62). These views of accountability in terms of South African education policies resonate with the innovative perspectives I proposed in Chapter 4. On the one hand, accountability shows a link with *managerial professionalism* which indicate how teachers are managed and are enabled to manage the direction of their own professional development (*infra*: 4.8). On the other hand, accountability seems to be compatible with *responsibilised teacher autonomy* in the sense that teachers are responsibilised to act autonomously (*infra*: 4.8). Later in this chapter I intend to probe how the mentioned perspectives may be utilised to empower South African teachers regarding professional autonomy (*supra*: 5.4.5 and 5.4.6).

The above deliberation (*infra*: 5.2.1-5.2.3) in mind and considering my identified innovative perspectives in the previous chapter (*infra*: 4.8), I argue that the empowerment of teachers regarding *professional autonomy* can be considered relevant. As a reminder, these innovative perspectives have been labelled: *performative managerialism*, *performed teacher autonomy*, *disciplinary professionalism*, *flexibilised teacher autonomy*, *managerial professionalism* and *responsibilised teacher autonomy*. My point is that the innovative perspectives regarding teacher autonomy and professionalism reveal indicators which denote a need as well as prospects for South African teachers to develop professionally in an autonomous manner. I argue that if analysed, the innovative perspectives may be utilised to provide edification on how to empower South African teachers in terms of *professional autonomy*.

In the next section, I shall utilise the six innovative perspectives in an attempt to make suggestions as to how South African teachers may be empowered regarding professional autonomy.

5.3 SOUTH AFRICAN TEACHERS AND PROFESSIONAL AUTONOMY

This section aspires to explore possibilities how the innovative perspectives relating to teacher autonomy and professionalism may be utilised to empower South African teachers regarding professional autonomy. During my explication as to how South African teachers may be empowered, I do not aim to showcase stumbling blocks associated with professional autonomy. This has been done in Chapter 2 where I frequently made reference to the more negative implications relating to autonomy and professionalism. My argument is that empowerment resonates with the notion that professional autonomy in the sense that it enhances rather than undermines teachers' educational practices by situating them as the primary authors of their teaching practices (*vide*: Hyslop-Margison & Sears, 2010: 2). I further argue that when South African teachers are empowered regarding professional autonomy, teachers' voices may become a buffer against mere educational compliance and conformity.

Obedient to my explanation above, I shall start this journey with an exploration on how disciplinary professionalism may contribute to the empowerment of South African teachers regarding professional autonomy.

5.3.1 Disciplinary professionalism and South African teachers' professional autonomy

In this section I aim to explore how disciplinary professionalism is connected to professional autonomy. Later, I shall indicate how the notion of *homo economicus* (*supra*: 5.3.1.1), as a form of disciplinary professionalism, may be utilised to promote South African teachers' professional autonomy.

I conceptualised disciplinary professionalism as a **technique of power that serves as governmental route that discipline teachers in order to constitute their professionalism** (*infra*: 4.6.1). The actual aim of disciplinary professionalism is a way of revealing how teachers are exposed to forms of subjectification. The idea of subjectification refers to a

governmental route taken by education authorities to govern the conduct of teachers to such extent that they become: “*the obedient, the individual subjected to rules, order, and an authority that is exercised continually around them and upon them*” (Foucault, 1975: 129). For me, Foucault’s (1975) view brings together the government of teachers where their practices are examined to determine whether they are doing what they ought to and whether they are developing professionally as they should. I detect such power of disciplinary professionalism in the CPTD which aims at disciplining teachers: “*to achieve sharper focus and effectiveness*” (Department of Education, 2008: Executive Summary). Disciplinary professionalism in the prior stipulation emerges in the normalisation of teachers’ behaviours so as to gain conformity to educational standards. Drawing on Foucault (1975: 184), I argue that the SAdoE’s act of normalisation play out as a corrective disciplinary action aiming to classify teachers’ behaviour. The purpose would be to punish teachers so as to keep them obedient to regulatory rules. Such disciplinary regulations usually deny teachers to be visible as professionals. This happens when teachers’ have to prove sharper focus in their work as well as to increase production and effectiveness. As a result, I am of opinion that South African teachers are subjugated, because they are turned into docile objects that have to match the criteria of professional competence.

Considering South African education policy in a globalised context, there is a way to counterbalance teachers’ subjectification in terms of disciplinary professionalism. Hamann (2009: 38) proposes that: “*while the effects of subjectification in our globalised world are very much evident, we should recognise and invent forms of counter-conduct to resist the dangers of subjectification*”. Here, counter-conduct encourages individuals to govern themselves to become certain kinds of people (professional autonomous people, who put mechanisms in place through which individuals contribute to a modified self). Foucault refers to such counter-conduct as *homo economicus* (Foucault, 1993: 203). In the sub-section to follow, I intend to elaborate on the notion of *homo economicus* as a counter-conduct of disciplinary professionalism to illustrate how it can be utilised to empower South African teachers regarding professional autonomy.

5.3.1.1 *Homo economicus* for South African teachers

Foucault’s 1978-1979 course lectures at the College de France which focused on *The Birth of Biopolitics* offered what is today identifiable as a remarkably prescient analysis of the

influence of globalisation on education policy. Research on education policy in a globalised context drew upon Foucauldian notions of governmentality which try to provide information on the social conditions conducive to the constitution of *homo economicus*.

Homo economicus refers to a free and autonomous individual who uses rational choice to emerge as an entrepreneur of the self in order to become a certain kind of person (Hamann, 2009: 38). For me, this means that the work individuals perform upon themselves is of such nature that individuals construct their own lives through the choices they make albeit the kind of life (conditions) available to them. In other words, individuals arrange the conditions prescribed to them in such a fashion so as to act with professional autonomy. If related to South African education, it becomes evident to me that:

“Homo economicus enables teachers to be in control of their own conduct in terms of how they can use knowledge to help themselves to become professional autonomous beings” (my own conceptualisation).

In terms of the above conceptualisation, I argue that if South African teachers are to be empowered to embrace the notion of *homo economicus* they may be positioned to take care of their own professional autonomy. In the words of Brown (2005: 43): *“Homo economicus is constructed as a calculating entrepreneur who is not only capable of, but also responsible for caring for him of herself”*. Thus, South African teachers have to discover the hidden self that has been concealed and they have to take care of the self so as to liberate themselves from educational docility. For instance, despite educational goals like *“to achieve sharper focus and effectiveness”* (*infra*: 5.3.1) that aims to cultivate teachers as compliant individuals, *homo economicus* may assist South African teachers to foster professional autonomy. I argue that for South African teachers to liberate themselves in order to obtain professional autonomy, they have to:

“Develop a great level of self-awareness about the nature and impact of their performance and create opportunities for professional growth” (*vide*: Hussain, Mehmood & Sultana, 2011: 1).

The above view implies a development of teachers as the entrepreneurial self. Thus, although South African teachers' conduct is directed by educational goals, teachers possess

entrepreneurial ability to: “*grow out of a person’s commune with others*” (*vide*: Beames, 2005: 14). When individuals “grow out”, they develop a great level of self-awareness. During the course of my teaching career, I develop an understanding of self-awareness as an ability of who one is, what one has to offer and how to make one’s offering valid. The implication is that teachers frequently have to weigh their job proficiency; strive to maintain responsibility for their actions and being able to act without fear of sanction. The relevance of *homo economicus* in this regard is that South African teachers engage in a particular form of truth telling in the sense that they make choices based on informed reflection. When teachers involve themselves in truth telling, they engage in a *reflective conversation* with the self (Besley, 2005: 80). During such conversation, teachers should interrogate what they do, question the educational values and goals which inform what they should do and subsequently they should learn from their experiences (Ghaye & Ghaye, 1998: 19). The implication of a *reflective conversation* for the South African *homo economicus* is that whilst teachers challenge educational goals, they should reaffirm values and goals they perceive as important in defining the kind of educationist they aspire to be. Therefore, teachers not only explore previous teaching experiences, but also focus on possibilities for future action and practice (Zwozdiak-Myers, 2009: 16).

From the fore-going, I recommend that South African teachers’ professional growth be driven by intrinsic motivation, whilst teachers should stay abreast of educational developments and not overly rely on knowledge gleaned during previous educational experiences. Whilst my recommendation relates closely to central features of the idea of a reflective teacher, the realisation of teachers’ professional worth through *homo economicus* contributes to professional autonomy in their work. Here, professional autonomy is about striving for what you believe in and empowering yourself as a teacher. For me, this implies that South African teachers should have a strong sense of self-consciousness, cultivate a spirit of self-actualisation and live with an independent personality. (*vide*: Kipnis, 2011: 293).

Considering the development of an entrepreneurial self through internal reflection, South African teachers may obtain professional autonomy to “*achieve sharper focus and effectiveness*” as demanded by the SADOE. Therefore I argue that, not only do *homo economicus* encourages South African teachers to actively use their freedom to make valuable educational decisions regarding their practices. It also create opportunities that such decisions be based on personal professional choice. In the formulation of professional

choice, South African teachers should become: “*coherent, intentional, the locus of thought, the origin of its own actions and the beneficiary of a unique biography*” (Rose, 1998: 3). If South African teachers realise the power signified in the prior form of entrepreneurship, I argue that they would move beyond dogmatic conceptions of who they should be. Thus, once South African teachers incorporate an idea of *homo economicus* within the workplace, they would become the designers of their own professional autonomy.

Insofar as the *homo economicus* is fashioned as entrepreneur of the self, such arrangement keeps track with the flexible ways in which individuals become takes care of the self. This resonates with the second innovative perspective, *flexibilised teacher autonomy*, because individuals are rendered flexible opportunities to be autonomous to do things for themselves, through an acquisition of competencies such as communication and problem-solving skills (*infra*: 4.6.2). Therefore, I hold the view that teachers may feel more empowered to take charge of their own course of professional autonomous action. In the next section, *flexibilised teacher autonomy* will be probed to explore how it may contribute to South African teachers’ professional autonomy.

5.3.2 Flexibilised teacher autonomy and South African teachers’ professional autonomy

This section starts with an exploration of the connection between *flexibilised teacher autonomy* and professional autonomy. Later (*supra*: 5.3.2.1), I shall provide an explication how *self-surveillance*, as a form of *flexibilised teacher autonomy*, may be utilised to promote South African teachers’ professional autonomy.

Previously, I made the observation that an appeal to *flexibilised teacher autonomy* emerges when individuals **act as free beings in response to flexible opportunities afforded to them in lieu of organisational demands** (*infra*: 4.6.2). Drawing on my previous view, I am of opinion that flexible opportunities for teacher autonomy enable them to acquire a capacity of the self (*autos*) so as to give itself a set of rules (*nomos*) to act in an independent manner (*vide*: Badrinathan, 2011: 253). To illustrate, I argue that if selves (teachers) are flexibly positioned to interpret educational demands in education policies, they may enjoy autonomy and feel more powered to take charge of their own course of action. For me, it is almost as if teachers blend with the rules of the game to be in control of the professional profile assigned

to them. For instance, South African teachers should: “*interpret provided learning programmes and design original learning programmes*” (Department of Education, 2000b: Section 7). Here, the NSE simultaneously prescribes what South African teachers should be, whilst they are also allowed to be unique regarding the way they want to execute the suggested role they have to perform. In terms of the prior stipulation, flexibilised teacher autonomy is relevant in relation to professional autonomy, because the NSE provides the professional teacher with prospects for independent action. Foucault explains that such action assumes: “*recognising available choices already been defined and how support is to be rendered to individuals to understand how to use such choices to be independent*” (Foucault, 1977a: 221). I suggest that, in order to assist teachers to recognise choice within a position of flexibilised teacher autonomy, they have to be empowered how to practice *self-surveillance*.

One of the aims of *self-surveillance* is to encourage a state of conscious visibility that promotes an automatic functioning of individual power (Foucault, 1979: 201). Thus, I propose *self-surveillance* as a strategy to empower South African teachers’ professional autonomy to make them play spontaneously upon flexible educational opportunities provided to them so as to be in charge of their professional teaching practices.

Subsequently, *self-surveillance*, as a way to empower South African teachers regarding professional autonomy, will be deliberated.

5.3.2.1 *Self-surveillance* for South African teachers

I want to put forward the view that an application of *self-surveillance* in this section aims to empower South African teachers regarding professional autonomy. In doing so, I work with the assumption that *self-surveillance* requires that individuals must work upon themselves (their actions and thoughts) to become professional autonomous educational agents.

Self-surveillance is usually understood as the attention individuals pay to their behaviour when they are under observation by others whose opinions they deem relevant (Vaz & Bruno, 2003: 273). This means that individuals must investigate themselves on a continuous basis so as to prepare themselves to take care for and work on the self in order to position themselves to be considered independent individuals. If related to my teaching experience, I argue that

from the moment that individuals place themselves under *self-surveillance*, they confront educational instructions and work towards escaping from confinement which education policy may hold for them. Thus, in educational terms, I contend that *self-surveillance* may be seen as:

“A productive power utilised by teachers to look inside themselves, whilst confronting educational demands so as to free themselves to become what they might be” (my own conceptualisation).

A prerequisite for South African teachers in terms of my above conceptualisation of *self-surveillance* is their obligation to place themselves under critical scrutiny. When teachers engage in critical scrutiny, they find themselves in a position to assess their own educational motives against scholastic demands placed on them (MacKenzie, 2002: 189). The idea would not be to resist educational demands placed on them. Rather should teachers investigate the reasons behind educational instructions and deliberate with themselves how they would act on such demands. For instance, when teachers are instructed to: “*reflect on their own practice*” (Department of Education, 2006: Section 7), they have to confront such demand in order to free themselves in terms of what they might become. I argue that, in embracing the prior view, South African teachers would enhance professional autonomy by assessing their own beliefs and values against the educational demands of the SAdoE. In doing so, I believe that they would improve their attitudes towards teaching-learning processes, use their autonomy to generate educational change in schools and engage in professional development activities, amongst others. I argue that professional autonomy might be secured if South African teachers use *self-surveillance* to critically scrutinise their own teaching practices and works towards capacitating themselves to become what they want themselves to be.

I hold the view that South African teachers’ becoming in terms of *self-surveillance* implies that they become objects of their own critical gaze of measurement and control. In Foucauldian terms this means that South African teachers would elicit their participation in practices of self-regulation, an application of what teaching is supposed to be and what a teacher is (Foucault, 1977a: 143). As a consequence, South African teachers would be able to exercise professional autonomy, because they would grasp opportunities to assess, judge

and calculate their qualities themselves whilst they turn upon themselves as objects of critical scrutiny.

Mindful of the afore-going explication, I contend that *self-surveillance* by South African teachers may be regarded an ideal opportunity for them to flexibly utilise their autonomy to make choices regarding their teaching practices and act on the freedom that such opportunities may bring (*infra*: 4.8). When this happens, teachers may establish themselves as professionals able to engage in self-directed teaching practices so as to be the managers of their own professional development. The prior view resonates with the innovative perspective *managerial professionalism* which foster the idea that individuals (teachers) may see themselves as contributing towards the creation of managed self in terms of education policy demands (*vide*: Hall, 2013: 6).

Since I have just indicated that *managerial professionalism* seems to be complementary to contributing to fostering professional autonomy, I intend to next probe how it contributes to South African teachers' professional autonomy.

5.3.3 Managerial professionalism and South African teachers' professional autonomy

Of critical importance in this section is my endeavour to explore how managerial professionalism has relevance to professional autonomy. In section 5.3.3.1, I shall elucidate how the notion of *Ausgang*, as a form of managerial professionalism, may be applied to promote South African teachers' professional autonomy.

I conceptualised managerial professionalism as **a technology which may instigate professional norms, through opportunities for teachers, to manage the direction of their teaching practices and development** (*infra*: 4.6.3). Articulated in this way, I hold the view that managerial professionalism aims to grant opportunities to teachers to excel in delivering designated educational targets and carefully implement the plans educational authorities have defined for them. It is as if teachers would find themselves in a position where they are able “to act and think more freely” (Öztürk, 2011: 115). Interesting to me is how Öztürk's (2011) view is visible in South African education policy in terms of the SAdoE's approach: “to enable them to continually enhance their professional competence and performance” (Department of Education, 2006: Section 1). Here, I observe the presence of managerial

professionalism in the way the SAdoE affords opportunities for teachers to manage the direction of their own professional development as well as teaching practices. Thus, I argue that the SAdoE not only sets educational targets to be achieved by teachers, but that such targets simultaneously aim to empower them to exercise professional autonomy.

From the prior outline it is evident to me that South African education policy in a globalised context has a transferral motive in the sense that teachers are encouraged to find a way out of the state of affairs as is merely stipulated in education policy discourse. This, from a Kantian standpoint means that individuals (teachers) have to escape from the confines of discourse that: “*makes us obey authority in a thoughtless and uncritical manner*” (Olssen *et al.*, 2004: 40). An attempt to escape from education policy confinement is articulated as *Ausgang*. Consequently, I intend to elaborate on the notion of *Ausgang* as a form of managerial professionalism to illustrate how it can be utilised to empower South African teachers regarding professional autonomy.

5.3.3.1 *Ausgang* for South African teachers

In Maya Angelou’s *I Know Why the Caged Bird Sings* (1969), I read how the association of women with birds owe its oppressive quality to cages that immobilise them. Such associative quality is articulated in the following way:

“If you look very closely at just one wire in a cage, you cannot see the other wires. If your conception of what is before you is determined by this myopic focus, you could look at that one wire, up and down the length of it, and be unable to see why a bird would not just fly around any time it wanted to go somewhere” (Angelou, 1984: 24-25).

In my view, Angelou’s (1984) postulation is an indication of why humans do not always observe the confinements which controls them. Like in a bird cage, teachers do not always see beyond the limitations stipulated in education policy documents. I argue that it may be only when teachers are empowered regarding seeing beyond mere discourse in education policy that they may enjoy freedom to move beyond the so-called cages in education policy that render them docile bodies. Therefore, what I consider critical while reading about the Enlightenment Era is how reference is made to the notion of *Ausgang* which signifies “an

exit” or “a way out” from an existing state of affairs (Olssen *et al.*, 2004: 40). I relate the prior view to how an individual would be able to take a step back and taking a microscopic look at the whole cage, whilst investigating the wires that holds one back. If teachers would be obedient to my interpretation, I contend that they may find *Ausgang* from the confines of education policy discourse. Thus, in terms of Aneglou’s (1984) views and if related to South African teachers in a globalised context, I am of opinion that *Ausgang* could signify that:

“Teachers’ escape from confinements in education policy discourses with the aim to enjoy educational freedom in lieu of such discourses so as to manage and regulate their own particular teaching activities in a professional autonomous way” (my own conceptualisation).

The significance of my conceptualisation of *Ausgang* is based on my belief that South African teachers should regard professional autonomy as a personal sense of freedom and not to limit themselves to the confinements South African education policy discourses seemingly hold. My point is that South African teachers should rather use education policy discourses as: “*a capacity to decide what actions are appropriate and an ability to carry those actions to their own benefit*” (*vide*: Boote, 2006: 465). For me, it is almost as if South African teachers should use education policy discourses to deliberately engage in self-regulating their actions and behaviours so as to be committed to the educational goals of the SAdoE.

If South African teachers are to use education policy discourse as *Ausgang* in terms of the discussion above, I echo Papadimos, Manos & Murray (2013: 2) that they should occupy themselves in order to escape from confinement. This means that South African teachers should use education policy discourses to inspect their own abilities, cultivate an awareness of their personal limits, understand what the discourses are for and then use their knowledge to manage their own teaching activities amidst the educational goals set by the SAdoE. In doing so, South African teachers would be able to act with professional autonomy, because they would allow themselves to bridge the gap between theory (education policy discourses) and practice.

Thus, insofar as *Ausgang* is concerned, I am of opinion that South African teachers should take care of themselves so as to simultaneously understand the consequences of the goals set by the SAdoE. When South African teachers have mastered knowledge about the self and

the meaning of education policy discourse, they may find it easier to escape from confinement. As a consequence, they may then find it easier to exercise professional autonomy in terms of testing the regulations in South African education policy discourses so as to move beyond the limits such discourses seemingly bring. An attempt to move beyond the confines of education policy discourse is complementary to a Foucauldian view which indicates that *Ausgang* also: “allow us to take responsibility for what we are and what we do” (Foucault, 1982: 4). I regard Foucault’s view as a call to South African teachers to take responsibility for the development of professional autonomy against the managerial goals of the SAdoE. In view of this call, I intend to probe responsibilised *teacher autonomy* in the next section so as to explore how it may contribute to South African teachers’ professional autonomy.

5.3.4 Responsibilised teacher autonomy and South African teachers’ professional autonomy

In this section I aim to explore how responsibilised teacher autonomy is relevant to professional autonomy. In section 5.3.4.1, I shall illuminate how the notion of *recovery*, as a form of managerial professionalism, may be applied to promote South African teachers’ professional autonomy.

In Chapter 4, I conceptualised responsibilised teacher autonomy as **a capability afforded to teachers to become educational participants who are able to be and to do amidst those managed processes by which they are guided** (*infra*: 4.6.4). Analysing such view of responsibilised teacher autonomy, teachers become connected to liberal practices so as to pursue a more professional destiny. My point is that teachers are positioned as individuals in control of their educational choices, actions and planning, amongst others. For instance: “*It is the responsibility of teachers themselves to take charge of their self-development and to use all opportunities made available to them*” (Department of Education, 2006: Section 7). Here, although regulated by the SAdoE, I am of opinion that South African teachers are freed from strict bureaucratic lines of authority in the sense that they are responsibilised to be in charge of their own professional practices. My point is that, not only does the SAdoE ascribe responsibilities to teachers in this country, but it also contributes to an autonomous acceptance of responsibilities for the self (*vide*: Afonso, 2009: 59). The prior statement is an indication of the relation between responsibilised teacher autonomy and professional

autonomy. Here, I am of opinion that autonomous teachers should assist themselves in enlarging the scope of choice and autonomy regarding their professional responsibilities so as to move towards what they think of as the most desirable forms of independent human activity.

Based on the preceding discussion, I become aware of how South African education policy in a globalised context lays the foundation for teachers to, amidst state regulation, articulate their own goals and design their unique paths towards achieving such goals. This means that teachers use the responsibilities articulated in South African education policy to optimise their autonomy and independence in terms of controlling their own professional development, exercise choice in terms of their educational growth to gain control over their lives as teachers. The implication is that teachers are placed in a position of *recovery*, meaning that they use education policy discourse to take back control so as to be in charge of their own professional activities. Consequently, I want to elaborate on the notion of *recovery* as a form of responsabilised teacher autonomy to illustrate how it can be utilised to empower South African teachers regarding professional autonomy.

5.3.4.1 Recovery for South African teachers

Since the mid-1980s, research and policy studies have concentrated on the notion of *recovery* as an inspiring concept. In such context, *recovery* emerges from inside one's self, even though it may be facilitated by external conditions (Jacobson & Greenley, 2001: 483). For instance, I argue that education policy discourse carries prescribes messages in terms of teachers and their work, but, when analysed, it also may reveal developments of new meaning and purpose in their lives. I align my prior argument with a stipulation which emphasises: “*the development of the responsible autonomy of the teaching profession and the confidence of teachers by enabling the teaching profession itself to take fuller responsibility for its own development*” (Department of Education, 2008: Section 2(4)). I regard the prior views as how teachers (as agents of the teaching profession) are instructed to take control over their lives and ultimately to be responsible for their own individual journey of recovery.

If the above discussion is to be related to South African education, I articulate *recovery* as:

“The responsabilisation of teachers to take control of their own teaching practices and to do as much as possible so as to live like recovered individuals” (my own conceptualisation).

From my conceptualisation above, I argue that *recovery* is an opportunity for South African teachers to step away from the idea that education policy discourses should merely be regarded as acts of compliance. In this context, South African teachers should consider *recovery* as a possibility to regain control of their teaching practices so as to become independent individuals. This, from a Foucauldian frame of reference is possible when South African teachers utilise their already existing knowledge and competence to question the obvious and assumed meanings in education policy discourses (*vide*: Foucault, 1977b: 128). Therefore, the task laid upon South African teachers is to engage in a penetrative perception of their present realities, to locate their strengths and position themselves so as to use their power to become self-managing individuals.

Thus, if South African teachers are to adopt a spirit of *recovery*, they would indeed become self-managing individuals who might be able to silhouette their teaching practices amidst education policy regulation. In such becoming, South African teachers would find themselves along the lines of professional autonomy. What I am trying to say is that South African teachers would master to manage their own professional lifestyles in an autonomous way, since they would learn to embrace a spirit of “do it yourself”. Here, I argue that South African teachers should use *recovery* as a mechanism of professional autonomy to uphold a spirit of free inquiry and open-mindedness so as to be regarded professionally competent.

Crucially important for South African teachers is that they should be attentive that *recovery*, in terms professional autonomy, challenge them to be aware of what it means to be a professional under educational scrutiny all the time. My point is that, albeit education policy regulation, teachers in this country should use *recovery* as a legal responsibility of education, without abdicating their status as custodians of their autonomy and professionalism. By utilising *recovery* to uphold professional autonomy, South African teachers would move in a direction knowing how to perform as professionals. In doing so, I am convinced that South African teachers would become educational players capable of performing their roles as autonomous professionals in education.

The prior view relates to the fifth innovative perspective, *performative professionalism*, in the sense that *recovery* seems to be contributory in enabling South African teachers to act in accordance to real life experiences in the educational settings they find themselves (*infra*: 4.6.5). In view of my prior perspective, I intend to probe *performative professionalism* in the next section with the aim to explore how it may contribute to South African teachers' professional autonomy.

5.3.5 Performative professionalism and South African teachers' professional autonomy

This section aspires to explore how performative professionalism aligns with professional autonomy. In section 5.3.5.1, I shall illuminate how the notion of *performer*, as a form of performative professionalism, may be applied to promote South African teachers' professional autonomy.

Earlier in this dissertation, I conceptualised performative professionalism as **a policy technology which makes visible a performance-scripted character of teachers' identity in pursue of achieving professional performed targets** (*infra*: 4.6.5). In relation to the prior-mentioned conceptualisation, I am of opinion that for teachers, performative professionalism signifies both a way of life as well as exercising power given to them. A way of life encompasses the thought of how individuals utilise their ideas and competences in connection with the power afforded to them by education policy discourses (Kidwell, 2009: 535). I argue that for teachers, this has to do with how they exploit the spaces afforded to them by education policy discourses. Also, I am of opinion that a way of life involves the extent to which teachers would use their ideas and competences to counterbalance educational limits they may face. If teachers would use opportunities afforded to them, professional autonomy becomes connected to how they use their power to oppose limitations seemingly present in education policy discourses.

To illustrate, the above views is articulated in South African education policy in the following way: "*To enable them to continually enhance their professional competence and performance*" (Department of Education, 2006: Section 1). For me, this stipulation portrays the teacher as a professional autonomous performer. Within such a view, it seems as if South African teachers are afforded opportunities to perform in visible ways whilst seeking their

place, worth and needs in the education system. For me, it is almost as if South African teachers engage in a new relationship with the self in terms of what they: “*can alone do and do best*” (Kumar, 1997: 29), that is, to use education policy discourse to perform in a professional autonomous way. It is as if the SADOE encourages teachers to *perform* autonomously in the best possible ways they can. If this is the case, I intend to explore the notion of “*performer*” as an attribute of performative professionalism to illustrate how it can be applied to empower South African teachers regarding professional autonomy.

5.3.5.1 Performer for South African teachers

When Judith Butler extends critique on performativity by asserting that: “*performative acts are forms of authoritative speech*” (Butler, 1993: 225), it becomes known that the performance of such acts may be regarded as a kind of binding power. This means that when individuals are afforded opportunities to perform acts of authoritative speech, they are enabled to work towards the re-constructing of the self. I link the prior statement to an earlier writing of Butler (1990) where she posits that: “*we perform acts of identity to become what we want to amidst highly regulatory frames*” (Butler, 1990: 25). Engaging with Butler’s (1990) thinking, I am of opinion that it is possible for teachers to perform as professional and autonomous beings albeit strict regulations in education policy. Thus, for the South African teacher to be a *performer*, I am of opinion that:

“Teachers become performers when they use education policy discourse to create an identity to develop a conduct and appearance so as to act in an autonomous manner” (my own conceptualisation).

My conceptualisation above takes me away to Carvalho’s (2010) story about a waiter in a café who is not only able to take orders and not merely apprehend the practical knowledge apparatus of a profession. Rather is it about appearing as a café waiter, that is, moving fast, embodying a character and a pattern (Carvalho, 2010: 14). Considering Carvalho’s (2010) tale and my conceptualisation, my argument is that South African teachers should use education policy discourses to perform in a given set of realities. After all, I am of opinion that to perform is to appear in a certain way so as to become the centre of one’s own autonomous action.

If South African teachers are to adopt the notion of *performer*, they would be able to show: “*resistance to power*”, because “*resistance is multiple and can be integrated in global strategies*” (*vide*: Foucault, 1980: 142). Thus, in order to be a *performer* to resist power in education policy, I recommend that South African teachers should have the capacity for ongoing learning, taking control for such learning, tactfully consider their educational options and minimise chances to be exposed as weaklings. In doing so, I strongly believe that professional autonomy would then become teachers’ capacity and power to act against compliance as portrayed in education policy discourses.

The contribution of *performer* to South African teachers’ professional autonomy resonates with deconstructive insights I articulated earlier in the sense that teachers have to continually work on the self, while also considering how to be and perform in relation to education policy discourses (*infra*: 2.4.2). This implies that South African teachers’ would exercise professional autonomy when they adopt the role of *performer* in order to create and change things with their pre-positioning in educational events and unremittingly develop a sense of self in their engagement with the educational realities. In doing so, teachers would develop competencies such as self-determination, responsibility and become critical aware participants in South African education. Within the prior framework, professional autonomy would become a reality for South African teachers if they show willingness and ability to perform within a vision of education as liberation and empowerment. Therefore, I argue that the way in which South African teachers perform may be indicative of their understanding of their roles and tasks as autonomous professionals. Such understanding may contribute to teachers’ reconstruction of their professional and autonomous identities.

The above deliberation shows a strong connection to the notion of performed teacher autonomy which I identified, label and describe in Chapter 4. Such connection emerges in the thought that South African teachers should blend with the rules of the SAdoE and use opportunities afforded to them to act in an autonomous manner. Thus, complementary to the notion of the *performer* as characteristic of performative professionalism, I shall next explore how performed teacher autonomy may contribute to South African teachers’ professional autonomy.

5.3.6 Performed teacher autonomy and South African teachers' professional autonomy

In this section I aim to scrutinise how performed teacher autonomy has relevance to professional autonomy. Later, in section 5.3.6.1, I shall elucidate how the notion of *parrhesia*, as an attribute of performed teacher autonomy, may be applied to promote South African teachers' professional autonomy.

In Chapter 4, I conceptualised performed teacher autonomy as **the power to acknowledge one's subject position, adopting a critical stance to one's self in order to perform one's work in an independent manner** (*infra*: 4.6.6). Explaining myself here, performed teacher autonomy denotes a right to self-government, personal freedom and freedom of will, which is also synonymous to independence, liberty, self-rule and sovereignty. For me, such strong view regarding performed teacher autonomy implies that teachers deserve special respect because they seem to be individuals capable of self-determination who exercise choices without interference. For instance, the SADOE seems to be very adamant in terms of what it wants for South African teachers, that is: "*To enable the profession to re-establish its professional standing and role and advancing the ideals of social justice*" (Department of Education, 2008: Executive Summary). The prior educational demand has also reference to teachers, because the teaching profession may most probably not exist without humans as educational agents. Thus, I argue that just as the profession is to enjoy respect (in terms of social justice), teachers are also to enjoy respect in terms of autonomy (as a form of social justice). It is within the prior view that a link between performed teacher autonomy and professional autonomy manifests. Such manifestation may be articulated as: "*the respect teachers get so as to enable them to willingly go beyond the role of a compliant worker and become the authors of their own thought and action*" (*vide*: Vieira, 2010: 13).

In terms of professional autonomy, I interpret Vieira's (2010) view as an opportunity afforded to teachers to take courage to speak out on what they believe education policy discourses expects them to be. If this happens, teachers: "*enact their freedom*" in a professional manner. According to Foucault (1983: 54-55) being free and autonomous implies the cultivation of *parrhesia* which involves combining a caring of the self with attentiveness and caring for others. Drawing on Foucault, I intend to deliberate the notion of

parrhesia next so as to explore how it may contribute to empowering South African teachers regarding professional autonomy.

5.3.6.1 *Parrhesia* for South African teachers

Foucault (1983: 3) contends that the practice of *parrhesia* was regarded a moral obligation and a personal virtue. Explaining himself, Foucault indicated that the intention of *parrhesia* is, besides conducting oneself in a free and frank way, to foster the construction of a modern and critically reflective self. The purpose of such construction would be to avoid ending as slaves of an organisation or system, but rather to obtain mastery over the regulations of an organisation so as to be considered professional and autonomous beings (Foucault, 1983: 5).

I contend that *parrhesia* may be regarded significant for South African teachers' professional autonomy in the sense they should take liberty to learn how to interpret education policy discourse so as to express themselves in a free and frank way. This implies a personal commitment on the side of South African teachers in the sense that they should practice to give a detailed account of their thoughts so as to understand the educational realities they are experiencing through education policy discourses. Considering the prior perspective, I would then regard *parrhesia* as:

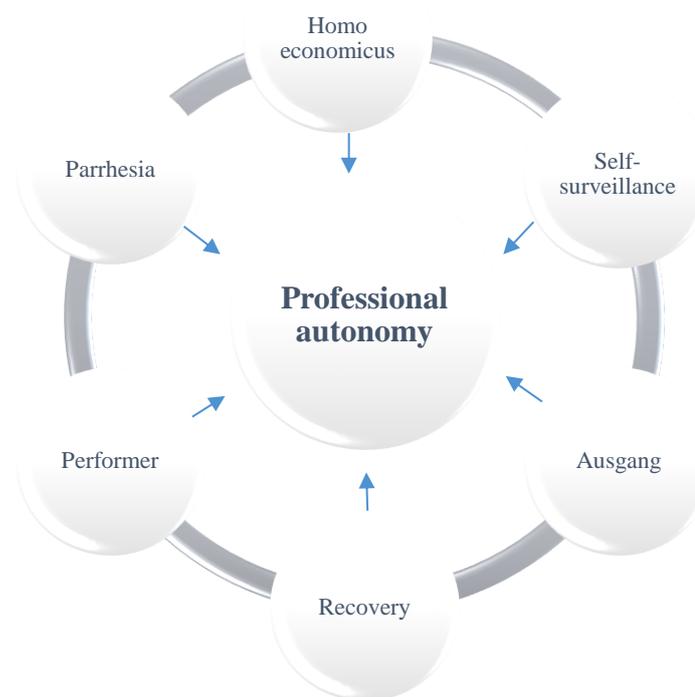
“The way teachers become the biographers of their own teaching abilities and experiences where they create significance to their own lives and those of others without diminishing the position of the individual self” (my own conceptualisation).

In terms of the above conceptualisation, South African teachers' autonomous speech acts may contribute to new realities regarding their teaching experiences, thus strengthening their insight and making them better able to take care of themselves and others. Echoing Foucault, I am of opinion that the practice of *parrhesia* would broaden teachers' scope of autonomy and provide them with greater self-mastery (*vide*: Foucault, 1983: 40). Thus, while speaking out and self-regulating their actions as well as behaviours, teachers, as members of a larger society, many a times highly commit themselves to the common good of that society. In this view, teachers become part of the process of building educational environments in which

teams of teachers, administrators and education experts work together to improve the school, redesign the curriculum and increase the power of teaching (Jiménes Raya, 2007: 32).

In view of my explication (*infra*: 5.3.1-5.6.1), professional autonomy for South African teachers is illustrated in the following way:

Figure 7: Professional autonomy for South African teachers



In terms of the above illustration, professional autonomy for South African teachers are possible, because they may be empowered how to develop abilities and skills for autonomous professional action, a capacity for independent decision making, willingness and confidence to carry out choices. Such empowerment, however, would involve risk-taking, persistence, resistance, subversion, inquiry and self-determination (Vieira, 2006: 24). Interestingly to me is that Vieira (2006) refers to the prior characteristics as components of professional autonomy. If related to South African teachers, it means that they should have tolerance of uncertainty, willingness to venture into the unknown as well as an ability to understand and deal with regulations in education policy discourses of the SAdoE. It also means that South African teachers would align themselves with a view of Vieira (2006) which I quoted earlier that teachers would acquire: “*the competence to develop as a self-determined, socially*

responsible and critically aware participants in (and beyond) educational environments, within a vision of education as (inter)personal empowerment and social transformation” (Vieira, 2006: 23).

5.4 CHAPTER SUMMARY

In this chapter I explored possibilities to answer my secondary research question: **how can the uncovered innovative perspectives contribute to the empowerment of South African teachers regarding their professional autonomy?**

Working from a postmodern deconstructive frame of reference, I first indicated that no grand narratives regarding professional autonomy exist. In doing so, I labelled three language structures that can be associated with professional autonomy (independent action, authority and accountability). I have shown how the prior language structures are compatible with notions of teachers “able to determine their lives in accordance with their authentic selves”, “access power to be in charge of their own educational affairs” and “become self-managing in terms of their own teaching practices”. Already here, I realised that these notions of professional autonomy have in mind teachers’ rejection of conformity and breaking with the limits of their everyday teaching experiences (with education policy discourses).

Of interest is how the above-mentioned language structures of professional autonomy have a connection with the six innovative perspectives which I proposed in the previous chapter. I shall briefly indicate the connection between professional autonomy and the innovative perspectives. First, disciplinary professionalism seems to serve as governmental route that subjugates teachers by turning them into objects that need to be disciplined in order to constitute professional autonomy. Second, flexibilised teacher autonomy affords teachers to make choices regarding their teaching practices and act on the freedom that such opportunities may bring. Third, managerial professionalism enables teachers to manage the direction of their teaching practices and professional development. Fourth, responsibilised teacher autonomy affords opportunities to teachers to become educational participants who are able to be and to do amidst those managed processes by which they are guided. Fifth, performative professionalism enhances teachers’ identity formation. Sixth, performed teacher autonomy encourages teachers to adopt a critical stance in order to perform their work in an independent manner. From these innovative perspectives, I made nameable and describable

six suggestions to how South African teachers may be empowered regarding professional autonomy.

The six suggestions have been identified as *homo economicus*, *self-surveillance*, *ausgang*, *recovery*, *performer* and *parrhesia*. My challenge was to show how the prior-indicated suggestions contribute to South African teachers' professional autonomy in terms of: "power placed in the hands of teachers" (*infra*: 5.1); "teachers' voices are being heard" (*infra*: 5.2); and "teachers having the competence to develop as a self-determined, socially responsible and critically aware participants" (*infra*: 5.3.6.1). In view of the prior requirements of professional autonomy, I ask the question if the six suggestions will contribute to empowering South African teachers regarding professional autonomy. My answer is "yes" and these are my reasons:

- *Homo economicus*: If South African teachers make effort to discover the inner entrepreneur, they would be able to develop self-awareness so as to liberate themselves from educational docility;
- *Self-surveillance*: By placing themselves under ongoing critical scrutiny, South African teachers would be able to engage in self-directed teaching practices in an attempt to be the managers of their own professional development;
- *Ausgang*: If South African teachers inspect their own abilities, cultivate an awareness of their professional limits and use their knowledge, they would be able to move beyond educational cages to escape from mere compliance in education policy discourse;
- *Recovery*: When South African teachers start to question the obvious and assumed meanings in education policy discourses, they will be able to manage their own professional lifestyles in an autonomous manner;
- *Performer*: To enjoy professional autonomy, South African teachers should participate in ongoing learning and tactfully consider their educational options so as to minimise chances to be exposed as weaklings; and
- *Parrhesia*: If South African teachers commit themselves to interpret education policy discourses, they will be able to give an account of their thoughts and to express themselves freely in an attempt to become self-regulatory.

I am, therefore, convinced that if South African teachers are to adopt my suggestions, they would enjoy professional autonomy in the sense that they would see themselves as free educational agents in charge of their own selves as well as their teaching practices. As such, I would like to add my own thought that South African teachers must stand ready and able to rearrange their teaching practices, skills, experiences, and achievements in order to define themselves anew in South African education in a globalised context.

In the following chapter I shall reflect on the research undertaken and put arguments forward regarding the contribution of this research to future education policy studies in the South African education policy landscape.

REFLECTION

6.1 INTRODUCTION

The aim of this study was to explore the research question: **How can a policy archaeology of South African education policy in a globalised context contribute to innovative perspectives on teacher autonomy and professionalism?** Working with the assumption that South African education policy has been drafted within a globalised context, four secondary research questions were previously dealt with to find answers to the primary research question. These questions were orientated in chapters to address issues such as: (i) a conceptual analysis of teacher autonomy and professionalism; (ii) regularities in South African education policy; (iii) innovative perspectives regarding teacher autonomy and professionalism by means of a policy archaeology of South African education policy; and (iv) the contribution of innovative perspectives towards the empowerment of South African teachers regarding professional autonomy.

Considering the research done by means of the above-indicated chapters, this chapter will deal with more than just the usual section on findings and recommendations usually applied at the end of a research project. My endeavour is to reflect on the contribution of this study to future education policy studies in the South African education policy landscape. I shall then articulate thoughts on possible limitations of this study after which prospects for future research will be deliberated on.

6.2 COMMENTS ABOUT THIS RESEARCH

This research reported on a policy archaeology of South African education policy in a globalised context to explore innovative perspectives regarding teacher autonomy and professionalism. I analysed three South African education policies namely, *Norms and Standards for Educators (2000)*, *National Framework for Teacher Education, Development in South Africa (2006)* and *Continuing Professional Teacher Development (CPTD) System (2008)* to achieve my intended aim. Albeit a compendium of education policies available in this country, I chose to analyse the prior-mentioned policies, because they provide a close

picture of educational development in South Africa and were indeed informative with respect to teacher autonomy and professionalism.

My research was heavily influenced by the writings of French philosopher, Michel Foucault, because his postulation: “*instead of legitimating everything you know, think differently*” (Foucault, 1985: 9) complements my search for innovative perspectives regarding the discourses under study. I also acknowledged the work of many authors in the text as their ideas were informative with respect to theories, notions, concepts and the research process itself.

6.3 PURPOSE OF THIS RESEARCH

In my opinion this research has achieved its purpose (*infra*: 1.4). My first significant achievement is the personal empowerment through exploring educational discourses that has been undergoing considerable changes due to the influences of globalisation on South African education policy. Not only did I obtain a deeper understanding of the discourses of teacher autonomy and professionalism, but I was also able to provide deconstructive insights regarding the mentioned discourses which I consider informative for South African teachers. Second, I was able to enlighten the reader why autonomy should still be considered a basis for human dignity and a basic moral respect. I have done this by drawing on Guyer (2003) who asserts that: “*autonomy has been articulated as that property of human beings by virtue of which they possess inherent dignity and therefore intrinsically deserves to be treated with basic moral respect*” (Guyer, 2003: 70). Interestingly, before I conducted this research, I was not very much aware that autonomy is regarded as a matter of dignity and respect.

This study has taught me that, not only do persons possess a capacity for autonomy in order to be considered motivationally independent, but that they should enjoy a law-giving capacity that is independent of determination from external influence, thus capacitate individuals with professional autonomy. Thus, guided by a postmodern deconstruction methodology and an original application of policy archaeology, I was able to understand and appreciate how South African education policies contribute to innovative perspectives about teacher autonomy and professionalism. As a consequence, this research granted me the opportunity to make suggestions as to how the constructed innovative perspectives (Chapter 4) could contribute to the empowerment of South African teachers regarding professional autonomy. Therefore, I

contend that this research provide insights which can potentially inform future policy interpretation, implementation and research.

To illustrate how this research has achieved its purpose, I shall henceforth provide a synopsis of each chapter showcasing the contribution made to the body of knowledge.

6.3.1 My first contribution: Postmodern deconstruction

When I visited my promoter for the first time regarding this dissertation and my intended research methodology, he remarked: “Talk freely so that I can interpret your thoughts”. I elaborated on my intention to work from a postmodern philosophy, because I believed (and still do) that discourses do not have singular meanings, that there are no ultimate realities regarding meanings and that no grand narratives about meaning exist. This postmodern stance in mind, I explained to him that I intended to search for innovative perspectives regarding teacher autonomy and professionalism as articulated in South African education policies in a globalised context. My postmodern thinking seemed to align with the notion that: “*a postmodernist will develop multiple meanings and difference over uniformity*” (Foucault, 1984: xiii). Thus, my endeavour to explore innovative meanings regarding teacher autonomy and professionalism was not far-fetched. Although my intention was to only work with postmodernism as research methodology, both my promoter and I realised that I also spoke from a deconstruction frame of reference. He then advised me to read more about deconstruction and I left with an instruction to provide feedback in terms of an appropriate research methodology for this study.

Whilst scrutinising seminal writings of Derrida (1976, 1978, 1981, 1984, 1988); Caputo (1997) and Cain (1984), amongst others, I came to understand deconstruction as a way of making an effort to go beyond the boundaries of meaning, to disrupt the present meaning in texts (also education policy texts) and to allow other meanings (difference) to emerge. Thus, deconstruction is more than just looking for different meaning. Rather is the aim to bring into view the impossibility to totalise and the possibility to expose multiple meanings of words (Biesta, 2001: 46). For me, the prior views seemed to complement explanations regarding postmodern. My viewpoint is that both postmodernism and deconstruction seemingly had the similar goal in mind, that is, an acknowledgement of pluralism and a move away from a belief in universal meanings. Having obtained such knowledge, I decided to

merge the two methodologies and proposed *postmodern deconstruction* as the research methodology for this study. By applying postmodern deconstruction, I took the stance that things – texts, institutions, traditions, societies, beliefs and practices – do not have definable meanings and determinable missions. Against this backdrop, postmodern deconstruction became useful as a methodology that guides my intention to analyse South African education policy to explore innovative perspectives regarding teacher autonomy and professionalism. For instance, in Chapter 2, I was able to articulate deconstructive insights regarding teacher autonomy and professionalism, whilst I deconstruct South African education policies in Chapter 3 in my search for regularities to conduct a policy archaeology in Chapter 4.

6.3.2 My second contribution: Conceptual analysis and Policy archaeology

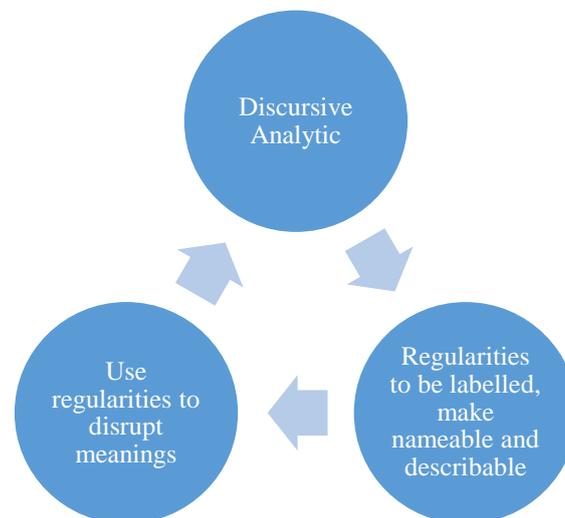
Although policy archaeology is to be considered my main research method, I regarded conceptual analysis as significant in terms of understanding what makes a concept what it is, that is, its constitutive meaning or rule (*vide*: Taylor, 1985: 137). Thus, by conducting a conceptual analysis, I was able to understand what meanings teacher autonomy and professionalism denoted and subsequently developed a richer vocabulary for dealing with these discourses. Later, I shall provide a more detailed reflection on my richer understanding and development of vocabulary with respect to teacher autonomy and professionalism.

As has been indicated, policy archaeology was my main research method and it is here that I claim to have made a contribution to the body of knowledge. I considered a policy archaeology, because it enabled me to subject structuralised views to deconstruction which further tolerated for the execution of postmodernist freedom to reconstruct innovative perspectives and meanings about teacher autonomy and professionalism. Notably, Scheurich (1997) developed policy archaeology from the writings of Michel Foucault and suggested four arenas that may be applied to conduct such analysis. These arenas are: the social construction of specific education and social problem; social regularities; a range of policy choices and policy solutions; and the social function of policy studies. During the presentation of my research proposal, I explained how the four arenas would be applied. However, one of the panel members commented: “Too heavy and too difficult”. I was annoyed by this observation, because I made effort to study these arenas and thoroughly explained how it would have been utilised.

I left the university with disappointment and grappled for weeks on end as to how I was going to interact with Scheurich (1997) so as to make the application of policy archaeology my own and present it in a more acceptable manner. I then re-read Scheurich (1997) and found that the arena 2 focuses on the application of regularities which play a significant role in conducting a policy archaeology, because it constitutes categories of thought and ways of thinking about discourse under study (Scheurich, 1997: 99-100). What I also found interesting was that an application of regularities would be in line with postmodern deconstruction in the sense that: *“things can no longer perceived, described, expressed, characterised, classified and known in the same way”* (Foucault, 1973: 217). I then knew that the application of regularities, instead of all four arenas, would contribute to my postmodern deconstruction view, that is, that similitude would no longer be the form of knowledge production regarding the discourses under study.

I decided to engage respectfully and intellectually with Scheurich (1997) and proposed that regularities, to conduct a policy archaeology of South African education policies, be applied in the following way:

Figure 8: My application of Arena 2 of policy archaeology



Firstly, I suggested that my focus would be on discursive analytics; a way to approach South African education policy text through the location of enunciations or statements that function with constitutive effects. Here, I have drawn on Foucault who privileges the “statement” extracted from the “simple inscription of what is said”. He describes the statement, not as a

linguistic unit like the sentence, but as a “function” (Foucault, 1972: 98). With Foucault (1972) in mind, I came to understand that a statement, as a function, can be theorised as a discursive junction-box in which words intersect and become invested with particular relations of power, resulting in an interpellative event in which one can recognise an act of regularity.

Secondly, after an original analysis of the three South African education policies, I labelled regularities and made it nameable and describable. Notably, I echoed Foucault that the elucidation of regularities constitute categories of thought and ways of thinking (*vide*: Foucault, 1973: xi), meaning that regularities unlock thinking patterns to analyse discourse in education policy.

Thirdly, I applied the labelled regularities to analyse South African education policies in the search for innovative perspectives regarding teacher autonomy and professionalism. An analysis of this kind has never been conducted before (*infra*: 1.4) and I was stimulated to search beyond the boundaries of meaning and try to disrupt existing perspectives regarding the afore-mentioned discourses.

By applying regularities as indicated above, I was able to deconstruct South African education policy texts to exhibit its foundations and: “*to think again and afresh*” (Biesta, 2001: 34) about teacher autonomy and professionalism.

Considering Ketlhoilwe’s (2007) views, I want to emphasise that the application of specifically Arena 2 of policy archaeology:

- was instrumental to the detection and revelation of meanings, power relations and coherence to gain knowledge of teacher autonomy and professionalism;
- enabled the labelling of regularities to conduct a policy archaeology of South African education policy in a globalised context;
- enabled an exploration and articulation of innovative perspectives of teacher autonomy and professionalism as articulated in South African education policies; and
- enabled the formulation of suggestions as to how to empower South African teachers regarding professional autonomy.

As a consequence, it was impossible to provide mere generalisations. In fact, my endeavour was never to seek generalisations, but rather to propose innovative perspectives regarding teacher autonomy and professionalism by analysing South African education policies in a globalised context.

6.3.3 My third contribution: Deconstructive insights

When I started chapter 2, I got permission from my promoter to appoint a critical reader with the understanding that he (my promoter) would have the final say regarding the outcomes of this chapter. This was necessary, because after my first attempt, both the critical reader and my promoter observed: “Although this chapter provides a literature overview of teacher autonomy and professionalism, what is your contribution to the body of knowledge”? It then took me two more re-writings of this chapter, before it was announced: “Now your voice and your contribution become visible”. I shall now reflect on research done in Chapter 2.

I indicated that, albeit a compendium of research available, the academic literature has been silent about extensive research regarding teacher autonomy and professionalism in South Africa. Firstly, I explored notions of teacher autonomy and came across a variety of articulations ranging from a right to freedom from control (Benson, 2000); capacity in self-directed learning (Little, 1995); teachers’ autonomy as learners (Savage, 2000) to those that see the concept as the process of building a personal identity for teachers (Contreras, 1997). Albeit these articulations, I used an explanation of teacher autonomy by a group of language teachers after the 2001 conference in Shizuoka (Japan) as a working concept:

“Characterised by recognition that teaching is always contextually situated, teacher autonomy is a continual process of inquiry into how teaching can best promote autonomous learning throughout life for learners. It involves understanding and making explicit the different constraints that a teacher may face, so that teachers can work collaboratively towards confronting constraints and transforming them into opportunities for change. Teacher autonomy is driven by a need for personal and professional improvement, so that an autonomous teacher may seek out opportunities over the course of his or her career to develop further (self-direction)” (Barfield, Aswell,

Caroll, Collins, Cowie, Critchley, Head, Nix, Obermeier & Robertson, 2002: 220).

I used Barfield *et al.*'s (2002) explanation to explore what it denotes regarding teacher autonomy. In doing so, I was able to extract quotes from the above-indicated explanation to categorise teachers in terms of teacher autonomy. I used the following format with explanations:

| | Extracted quotes | Categorisation |
|----------|--|---|
| 1 | <i>"...seek out opportunities...to develop further..."</i> | <i>Self-direction</i> |
| 2 | <i>"...promote autonomous learning throughout life..."</i> | <i>Lifelong learning</i> |
| 3 | <i>"...a continual process of inquiry..."</i> | <i>Critical reflection</i> |
| 4 | <i>"...confronting constraints and transforming them into opportunities for change..."</i> | <i>Opportunities for transformation</i> |
| 5 | <i>"...a need for personal improvement..."</i> | <i>Teacher identity</i> |

In view of the above categorisation of teachers, my arguments entailed the following:

Self-direction: Two subject positions of teachers were derived from this category of teacher autonomy, namely: the teacher as self-determined as well as component and autodidactic individual. These subject positions in mind, I argued that freedom is possible insofar teachers are in a position to diagnose, formulate, identify and make choices relevant to their teaching practices. If teachers are able to act in this way, they may become fully functional and in charge of their won teaching practices.

Lifelong Learning: One subject position of teachers was derived from this category of teacher autonomy, namely: the teacher in a position of empowerment. I shared the view that

the prior position may result in teachers experiencing a transformation of understanding; control over their own lives and educational practices; and the ability to exercise freedom of choice;

Capacity for critical reflection: One subject position of teachers was derived from this category of teacher autonomy, namely: the teacher in a position of liberation from structures of dominance. Here, I held the view that teachers engaged in intellectual and affective activities in which they critically analysed their past experiences to come to new understandings of their teaching practices;

Opportunities for transformation: One subject position of teachers was derived from this category of teacher autonomy, namely: the teacher in a position of consciousness towards a new self-definition. I was of opinion that transformation seems to be a form of enacted change that is planned with an intention to bring about significant changes in how individuals manage themselves; and

Teacher identity: One subject position of teachers was derived from this category of teacher autonomy, namely: the teacher in a position of becoming. In this context, I contended that teachers become the knowers of themselves within their practices of teaching and learning.

I argued that the value of the mentioned subject positions may be understood in terms of how discourse leaves meanings related to teacher autonomy incomplete and unfinished. With this view in mind, I went further to articulate deconstructive insights regarding teacher autonomy. As part of my further contribution to the knowledge corpus, I assembled the following insights regarding teacher autonomy:

- (i) *listening to the internal voice.* When teachers are able to be in command of themselves and considered the authors of their own work, they increasingly portray indifference to the opinions of others. In doing so, teachers may become the architects of freedom and independence which may contribute to the construction of teacher autonomy. I argued that if teachers would attempt to act as free beings, they would listen to themselves and rely on their own judgements;

- (ii) *confronting the self*. I argued that a confrontation with the self resonates with teachers' capacity to search for multiple truths of who they are, what they are able to do and with whom they may exchange information with; and
- (iii) *moving beyond the static pictures of identity*. I reasoned that the possibility exists that teachers are able to independently act to developing and transforming their identities so as to attain an autonomous mode of being.

Already here, a development in meanings regarding teacher autonomy emerged. I documented existing meanings of teacher autonomy from the academic literature, analysed those meanings to place teachers into subject positions and then derived deconstructive insights regarding teacher autonomy. From a postmodern deconstruction view, it became evident that meanings of teacher autonomy can be deemed incomplete and unfinished. After all, the afore-mentioned analyses placed me in a position to contribute to the knowledge corpus by means of constructing well-thought through insights of teacher autonomy.

However, since this research also focused on professionalism, I continued to explore the prior-mentioned concept and its relationship to teacher autonomy.

Although professionalism is considered a challenging concept, it became evident that it seeks to enhance the status of teachers and to encourage them to contribute actively to the promotion of educational reform and societal change. Within the context of the prior explication, the concept *professionalism* shows a relationship with *teacher autonomy* in the sense that professionalism is fundamental to the constant contestation between control and autonomy. For me it seemed as if professionalism contours how teachers are located within the profession, how they should act as professionals and how they should develop within their particular educational contexts. Because I undertook this research from a postmodern deconstruction methodology, I decided to deepen my search regarding the relationship between the two concepts under scrutiny. In doing so, I explored such a relationship in the following way:

Teacher autonomy in the teaching profession: Within this context, I placed teachers in three suppositions. First, I argued that teacher autonomy is promoted as a trait of professionalism in the sense that control over one's own work is a defining feature of the teaching profession.

Second, I held the view that teachers' professional knowledge and judgement pertaining to curriculum implementation is reduced by the mandatory application of professional standards on top of teachers' workload. Third, I reasoned that autonomy is not restricted to independent initiatives in the profession, but also applies to acts reflecting consent to external inputs or inducements.

I then identified two suppositions that guide my thinking regarding *teacher autonomy in relation to being professional*. On the one hand, teachers would have little opportunities to develop themselves so as to attain an autonomous mode of being. On the other hand, teachers may experience freedom to make discretionary decisions consistent with their scope of practice and the sovereignty to act on those decisions; and

Teacher autonomy and professionalization: Here, I suggested two suppositions relevant to teachers and firstly argued that they may develop confidence and competence to engage critically, not compliantly, with curriculum development, standards related to in-service training, discipline and professional practices of teaching. Also, I suggested that teachers not only ought to critically engage with contemporary ideas about teaching and learning, but also explore and critique widely accepted knowledge and ideas.

The above-indicated suppositions provided a means through which I was able to derive deconstructive insights regarding the relationship between teacher autonomy and professionalism. I shall briefly refresh the reader's mind what these deconstructive insights were.

First: professional knowledge informs the significance of teacher autonomy and professionalism and therefore:

- contribute to teachers' understanding of their roles as professionals, whilst it is also concerned with those norms and values they wish to achieve; and
- teacher autonomy may deteriorate, because of isolation; alienation and resistance to meaningful participation.

Second: teacher professional identity yields a richer understanding of the teacher self and as such:

- an achievement of mastery over themselves and their educational practices require from teachers to act upon themselves, to monitor, test, improve and transform themselves in the teaching profession; and
- teacher identity, in line with autonomy and professionalism, is constructed and reconstructed in teachers' interaction with people in their educational contexts.

Third: teacher professional development stimulates autonomous and professional relevance.

This implies that:

- professional development should place emphasis on self-directed teacher learning, because it focuses on teachers' growth as human beings and permanent learners.

Considering the above deconstructive insights, I argued that the professional development of teachers is to be considered a long-term process that includes regular opportunity and experiences planned systematically to promote growth and development in the profession. My point was that such development would be to foster a new image of teacher learning, a new model of teacher education, a revolution in education and even a new paradigm of professional development.

In Chapter 2, my contribution towards the knowledge corpus became evident in the enlightenment I provided with respect to teacher autonomy and professionalism. I, however, strongly argued that the search for innovative perspective could not stop with a literature analyses of teacher autonomy and professionalism in that chapter. My reason being: I wanted to adhere to my research method, policy archaeology, which is premised on the idea that there are networks of regularities with a certain generative power by way of producing categories of thought and ways of thinking about discourse under study. Thus, to think differently regarding teacher autonomy and professionalism, I explored South African education policies in a globalised context to uncover regularities which I argued would later be used as criteria to conduct a policy archaeology.

6.3.4 My fourth contribution: Regularities in South African education policies

My search for regularities in South African education policies in a globalised context was prompted by stipulations in SADoE (2000) which advises that one should: “*engage critically and creatively with global imperatives in education policy discourse*” (Department of

Education, 2000a: Section 4.1). For my research, the prior stipulation was significant, because globalisation requires a reconstruction of the teacher. The reconstruction of teachers can *inter alia* be seen in the governing control over teachers' agency. As teachers are re-territorialised and reconstructed, it is necessary to understand how globalisation constitute a manifest destiny relevant to teacher autonomy and professionalism.

In terms of the above, I argued that the implications globalisation held for teachers manifest in at least three ways, namely *complexity in social contexts*, *social relations* and *the exercise of power*. First, the teacher as autonomous and professional being in globalised contexts is reduced to collegial dope, placing the individual teacher in some kind of mediated action in the school. The implication is that teachers do not operate with agency and free will. Second, instead of having established a complete new set of social relations, globalisation seemingly contribute to less teacher autonomy, less control over teaching practices, professionalism and an increased autocracy in schools. Third, the exercise of power signals how teachers, their actions, attitudes, teaching practices and everyday lives are regulated in globalised contexts. Having analysed globalisation and its implications for teachers by means of the aforementioned attributes, I developed an understanding that such implications manifest in discursive practices within education policy discourse.

What captured my attention was the education policy in a globalised context is filled with texts that not only define what can be said and thought, but also who can speak where, when and with what authority. I argued that, because education policy texts are construed within a globalised context, expressions; information; ideas and intentions become discursive practices that regulate the educational practices of teachers. Consequently, it informs the function and actions of teachers and when this happens, teachers, their autonomy as well as professionalism are reassembled and re-territorialised within global education systems. Important to this study, the prior views of globalisation were also relevant to South African education policies. As has been indicated in the beginning of this section, South African education policies have also been redesigned in terms of knowledge, skills and competencies required to adhere to the challenges of globalisation. The prior in mind, it became evident to me that not only is South African education policy constructed within a globalised context, but it also became a principle mechanism by which educational practices of South African teachers are regulated. I contended that such directives would open up dialogue to explore how teacher autonomy and professionalism are articulated by South African education policy

in a globalised context. Because of globalisation's regulatory nature, I decided to scrutinise South African education policy to search for regularities which could be used as frames of analysis to explore innovative perspectives on teacher autonomy and professionalism.

My search for regularities in South African education policies was in line with a postmodern deconstruction methodology and it was complemented by Foucault who asserts that: "*the tranquillity with which they are accepted must be disturbed; we must show that they do not come about of themselves, but are always the result of a construction of rules of which must be known, and the justifications of which must be scrutinised*" (Foucault, 1972: 25).). Drawn on Foucault, I argued that regularities constitute frames of thinking with which to articulate and consider alternative perspective of teacher autonomy and professionalism. However, I indicated that before one would be able to search for regularities, it is necessary to explicate discursive formations which I explained as finding ways in which teachers' practices are regulated and how they are positioned in educational settings. In this sense, I proposed that the uncovering of discursive formations be considered in the following ways (Chapter 3):

Phase 1: Stipulations from the three mentioned South African education policies would be utilised for analysis. Statements from stipulations would be extracted to interpret the potential meanings they may bring to the fore;

Phase 2: An archaeological explanation would follow. This kind of description aimed at uncovering the interplay of similarities and differences as they appear on the level of the rules of formation (Foucault, 1972: 165). Here, who or what is made dominant or subordinate in South African education policies is exposed and relations of power are revealed; and

Phase 3: The act of regularity would be identified, made nameable and describable. In doing so, I intend to use the identified regularities to analyse South African education policy discourses to explore innovative perspectives on teacher autonomy and professionalism.

The application of the prior phases implied that regularities could not be pre-determined and I positioned myself to conduct a proper analysis of South African education policies in the search for regularities. I mentioned that regularities constitute policy archaeology and act as pre-conceptual frames to search for innovative perspectives regarding discourse under study.

Therefore, my intention was to label regularities, made them nameable and describable after which it would be applied to uncover innovative perspectives regarding teacher autonomy and professionalism in South African education policies.

I analysed stipulations from the NSE, NPFTED as well as CPTD and labelled three regularities, namely: *governmentality*, *managerialism* and *performativity*. *Governmentality* became visible in the way the SAdoE, through policy, controls; regulates and exercise authority over teachers. *Managerialism* emerged in how the SAdoE justifies its right to control the activities of teachers. *Performativity* arises from the mode of regulation that employs judgement which is displayed as means of control and attrition. During the unpacking of the labelled regularities, the following information manifested:

Governmentality is concerned with how we are governed and how we govern ourselves. With this knowledge in mind, I proposed that my intended analysis would focus on two criteria, namely: *governmental technologies of power* and *practices of the self*. My idea was to explore *modes of subjectification* (the authority to which teachers defer) as well as *art of governing the self* (the power afforded to teachers by education policy to become particular individuals).

Managerialism shows a reversibility character based on control as well as a move towards how teachers can manage themselves through managerialist discourses. Having considered this explication of managerialism, I suggested that South African education policies be analysed by means of *managerialism as technology of domination* and *managerialism as technology of self-constitution*. My aim was to explore how managerialism regulates South African teachers in terms of practices of domination, but also as a way to empower them.

Performativity enlightens about issues such as language and identity. In this paradigm, language becomes an enduring mode of social performance which produces new meanings to expressions of identity. Within this context, I recommended that South African education policies be analysed in terms of the notions that *the act of regularity creates a performance of identity* and *modifying the identity of the self through the act of regularity*. This meant that identity may be determined by discursively given norms (in education policy) and also give direction as to how individuals reconfigure their own identities as prescribed by education policy texts.

What one should not lose sight of is that regularities are not the same as policy archaeology. Rather, regularities constitute policy archaeology in the sense that it allows for a disruption of what is said and written in education policy texts. Thus, by conducting policy archaeology by applying regularities, the policy archaeologist (me) was enabled to think differently about discourse under study.

My contribution to the knowledge corpus in this regard can therefore be described as a way to open ourselves to be critical of how rules and regularities in South African education policy documents are informative about the discourses of teacher autonomy and professionalism.

6.3.5 My fifth contribution: Innovative perspectives of teacher autonomy and professionalism

Of particular interest to this research was the phrase, “innovative perspectives regarding *teacher autonomy* and *professionalism* as articulated in South African education policies”. I considered the prior phrase important, because I contended that innovative perspectives regarding teacher autonomy and professionalism might have been muted, repressed or possibly never be heard of. Thus, not only did I regard an analysis of this kind an important challenge, but it also emphasised the significance of this research, that is, to contribute to the expansion of the edifice of knowledge to the field of Policy Studies in Education. In an attempt to illustrate my contribution, I first provided an overview of South African education development and teacher regulation.

The argument of the regulation of teachers by South African education policy in a globalised context was complementary to an earlier viewpoint of mine which was articulated as: “*education reform and policy making in South Africa amidst globalisation have significant implications for teacher autonomy and professionalism*”. I based my argument on the notion that an analysis of South African education policies in a globalised context would enable me to rethink and reconceptualise ways in which teacher autonomy and professionalism are articulated in the NSE, NPFTED and CPTD. In Chapter 1, I indicated that such analysis would be by means of a policy archaeology of the prior-indicated South African education policies in a globalised context.

In terms of the prior delineation, I realised that I had been obedient to policy archaeology's call to label and apply regularities with the aim to explore innovative perspectives regarding teacher autonomy and professionalism. As a reminder, I analysed the NSE, NPFTED and CPTD to label, make nameable and describable three regularities (*infra*: 3.5) to conduct a policy archaeology. I want to emphasise that the labelled regularities and its application were drawn from my interaction with Scheurich (1997). Therefore, the focus was on my application of the three identified regularities and its criteria and not on Scheurich's (1997) application of regularities for policy archaeology. Consequently, I applied the three labelled regularities and its criteria to conduct a policy archaeology of the NSE, NPFTED and CPTD.

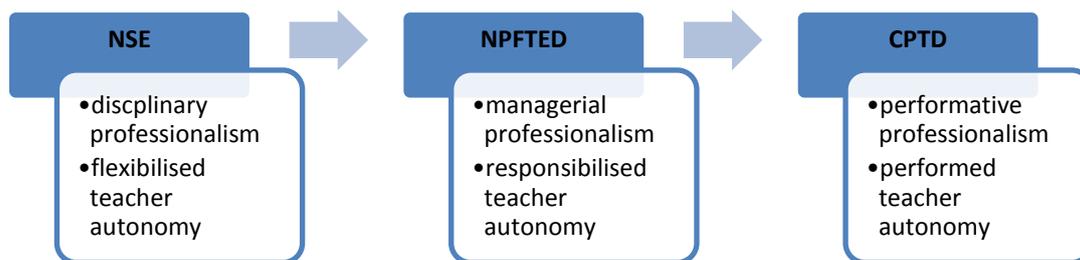
In Chapter 1, I introduced the above-mentioned South African education policies to the reader and in Chapter 4 I provided a contextual portrayal of the policies. A brief summary of these policies follow:

National Norms and Standards for Teachers (NSE) (2000): Regulation in the NSE emerged in the objectives of this policy, that is, that South African teachers should know how to perform their tasks when they would make instructional decisions regarding their teaching practices;

The National Policy Framework For Teacher Education and Development in South Africa (NPFTED) (2006): Regulatory interventions in the policy aim to provide teachers with an understanding of who they should be (professionalism) and what they are supposed to be capable of (teacher autonomy); and

Continuing Professional Teacher Development (CPTD) System (2008): This policy encourages teachers to act in certain ways so as to achieve the realisations of goals.

I then proceeded to use each of *De Klerk's Identified Regularities for Policy Archaeology* to analyse the NSE, NPFTED and CPTD to explore innovative perspectives regarding teacher autonomy and professionalism. Since I already conducted an analysis in Chapter 4, I shall provide a summary of the innovative perspectives regarding the mentioned discourses below. From my analysis, the following innovative perspectives emerged:



Disciplinary professionalism operates according to a principle of complete reconstruction, seeking to shape South African teachers in terms of pre-established norms. Under the sway of such disciplinary power, teachers are subjected to a complex ensemble of techniques of sovereignty, discipline and government so as to behave in ways in which the ones in power (the SADOE) wish them to. Within the context of *flexibilised teacher autonomy*, South African teachers might act as free beings in response to flexible opportunities afforded to them in lieu of organisational demands. I contended that when such flexibility can be observed, South African teachers should use opportunities afforded to them to diagnose their educational needs, formulate teaching goals, to identify human and material resources for teaching as well as to choose and implement appropriate teaching strategies. I argued that the SADOE opens space for teachers to carry out actions and tasks as loci of improving their abilities to manage their own professional growth.

Stipulations in the SADOE give substance to the notion of *managerial professionalism*, because teachers' managerial abilities are underscored by the way they take charge of their professional development. I argued that the value of *responsibilised teacher autonomy* for South African teachers manifest in human agency and capacity for authentic choice that grounds respect for the self and others. In other words, responsabilised teacher autonomy becomes the basis for accepting rules, and constitutes human beings as juridical subjects; it is what establishes the relation with one self and with others.

I held the view that *performative professionalism* makes visible a performance-scripted character of South African teachers' identity in pursue of achieving professional performed targets. Such a view signifies a reduction in professional trust of teachers and also contributes towards little space for an autonomous self. I also was of opinion that *performed teacher autonomy* implies that South African teachers would participate in their own subjectivities as they reflect on policy demands with the intention to develop skills,

knowledge and attitudes to be in control of their teaching practices. This implies that teachers then become less docile and subsequently they are positioned to reclaim autonomy. I argued that the innovative perspectives revealed a link between teacher autonomy and professionalism in terms of encouraging teacher responsibility, promoting teacher involvement in professional developing processes, allowing for teacher voice and encouraging flexibility in strategies for obtaining goals. In view of the prior deliberation, I was convinced that the door had been opened for empowering South African teachers regarding professional autonomy.

6.3.6 My sixth contribution: Professional autonomy for South African teachers

Echoing Raaen's (2011) view, I contended that professional autonomy be seen as power being placed in the hands of teachers such that they may possess leadership in terms of education policy and decision making regarding their teaching practices. By upholding such a view, I was very much aware that the suggestions I would propose, would not be from a finished position. Rather, I articulated my thoughts in line with postmodern deconstruction, because my intention was to displace singularity of meaning to some alterity. In doing so, I was able to make suggestions as to how the innovative perspectives could be utilised to empower South African teachers regarding professional autonomy.

Before articulating my thoughts regarding the empowerment of South African teachers, I explicated professional autonomy in terms of *independent practice*, *authority* and *accountability*. An explanation of the prior attributes of professional autonomy follows. I learnt that independent action is a way of strengthening teachers' autonomous and professional capacity to discern what follows from their beliefs as well as desires and to act accordingly. Consequently, when teachers act according to their beliefs and desires, they become known as an autonomous self. I also became knowledgeable as to how authority confers autonomy upon individuals so as to enable them to make decisions regarding their own practices. In this sense, autonomous individuals are presumed to have the capacity, the right and responsibility to exercise such authority. Furthermore, the importance of accountability is exemplified in the view that professional autonomous teachers obtain opportunities to learn how to direct their own development in terms of the goals of education. Having considered such views of professional autonomy, I contended that South African teachers could be empowered and exalted as professionals so as to be able to conduct

themselves in a professional autonomous manner. To achieve the prior objective, I provided the following suggestions how the innovative perspectives be utilised to offer edification regarding the empowerment of South African teachers in terms of *professional autonomy*.

From disciplinary professionalism, I proposed the notion of *homo economicus* as free and autonomous teachers who use rational choice to emerge as an entrepreneur of the self in order to become a certain kind of person. By this I meant that teachers would have opportunities to be in control of their own conduct in terms of how they can use knowledge to help themselves to become professional autonomous beings. Within this context, South African teachers have to discover the hidden self to take care of the self so as to liberate themselves from educational docility. Here, professional autonomy becomes visible when South African teachers strive for what they believe in and empowering themselves as competent individuals.

Drawn from my teaching experience, I suggested that, in order to assist teachers to recognise choice within a position of flexibilised teacher autonomy, they have to be empowered how to practice *self-surveillance*. Here, South African teachers should utilise flexible opportunities for to acquire a capacity of the self (*autos*) so as to regulate themselves by means of a set of rules (*nomos*) to act in an independent manner. Thus, my advice was that South African teachers should engage in critical scrutiny. If they do the latter, they would find themselves in a position to assess their own educational motives against scholastic demands placed on them. The implication would be that South African teachers should investigate the reasons behind educational instructions and deliberate with themselves in order to position themselves regarding their actions on demands placed on them.

From managerial professionalism I deduced *ausgang* as a way to escape from confinements in education policy discourses with the aim to enjoy educational freedom in lieu of such discourses so as to manage and regulate their own particular teaching activities in a professional autonomous way. I argued that *ausgang* implies that South African teachers should use education policy discourses to inspect their own abilities, cultivate an awareness of their personal limits, understand what the discourses are for and then use their knowledge to manage their own teaching activities amidst the educational goals set by the SADOE. As a consequence, South African teachers may find it easier to exercise professional autonomy in terms of testing the regulations in South African education policy discourses so as to move beyond the limits such discourses seemingly bring.

When South African teachers would use the responsibilities articulated in South African education policy, they would be in a position to optimise their autonomy and independence in terms of controlling their own professional development. The implication would be that teachers would be placed in a position of *recovery*, meaning that they would use education policy discourse to take back control so as to be in charge of their own professional activities. This would be possible when South African teachers utilise their already existing knowledge and competence to question the obvious and assumed meanings in education policy discourses. As a consequence, the task laid upon South African teachers is to engage in a penetrative perception of their present realities, to locate their strengths and position themselves so as to use their power to become self-managing individuals.

Performative professionalism argued for a way of life which involves the extent to which South African teachers would use their ideas and competences to counterbalance educational limits they may face. From this notion, I argued that South African teachers would become *performers* that use education policy discourse to create an identity to develop a conduct and appearance so as to act in an autonomous manner. This implies that South African teachers' would exercise professional autonomy when they adopt the role of *performer* in order to create and change things with their pre-positioning in educational events and unremittingly develop a sense of self in their engagement with the educational realities. In doing so, teachers would develop competencies such as self-determination, responsibility and become critical aware participants in South African education.

Within a view of performed teacher autonomy, South African teachers may become individuals capable of self-determination who exercise choices without interference. Here, I argued that *parrhesia* may be regarded significant for South African teachers' professional autonomy in the sense they should take liberty to learn how to interpret education policy discourse so as to express themselves in a free and frank way. In this way, South African teachers should learn to speak out and self-regulating their actions as well as behaviours so as to be in a position to strengthening their insights and making them better able to take care of themselves and others.

I held the view that the above-mentioned suggestions meant that South African teachers would acquire competence to develop as a self-determined, socially responsible and critically aware participants in (and beyond) educational environments, within a vision of education as

(inter)personal empowerment and social transformation. I am therefore convinced that my suggestions are feasible and as such be regarded as a starting point for South African teachers to free themselves from becoming entirely docile, whilst they work towards achieving more professional autonomy.

My reflections (6.3.1-6.3.6) are a clear indication of the significance of this study for South African education policy studies. In the next section, I shall put arguments forward for my prior-mentioned claim.

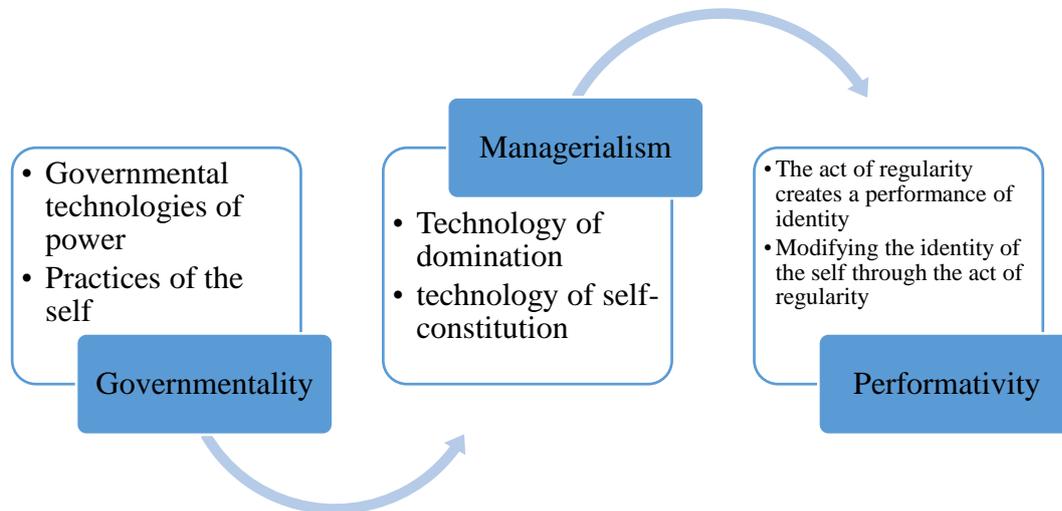
6.4 SIGNIFICANCE FOR SOUTH AFRICAN EDUCATION POLICY STUDIES

My endeavour is to reflect on the contribution of this study to future education policy studies in the South African education policy landscape.

Having conducted this research, I believed that I have provided students of educational policy studies and social policy analysts generally with a policy archaeological method, and with the philosophical concepts and principles necessary for the critical analysis of educational policy in a globalised context. Inspired by the writings of Scheurich (1997) and Foucault (1972, 1973, 1979 and 1988) I used a different approach to education policy studies than merely to search for descriptions of problems and competing solutions in education policies. Rather, I applied policy archaeology to critically interrogate how teacher autonomy and professionalism are articulated in South African education policies in a globalised context. As a recent development in educational policy studies policy archaeology not only provides a method for analysing educational and social policy, but it goes beyond the traditional policy studies framework as it accepts or presumes a commitment to the larger liberal world view in which it exists (Scheurich, 1997: 94-114). As an approach to policy studies where one opens up a new territory that establishes a new problematic, policy archaeology is an approach that serves to alter and expand the area of policy studies.

I argue that the application of Arena 2 of policy archaeology is significant for future education policy studies in South Africa, because entails philosophising about educational research in this country. Not only did I built on the analysis of existing discourses, but I also provided scholars, educationists and researchers with regularities and criteria to analyse education policies so as to provide enlightenment regarding concepts in South African

education polices. Although I have given a synoptic account of my labelled regularities and its criteria in 6.3.4 above, I only mentioned the criteria for each of the regularities, but did not specifically reflect on the criteria. Below is an indication of De Klerk's Identified Regularities for Policy Archaeology and its criteria as explicated in chapter 3:



I want to caution the reader that the above regularities and its criteria should not be seen as a step-by-step framework to analyse South African education policies in a globalised context. Rather, I am of opinion that the significance of the labelled regularities for South African education policy studies should be interpreted as reminder that:

- we need to begin to think differently about meanings of discourse in education policies;
- education policy discourse is always open to continual negotiation and contestation;
- power relations in education involves not only what is said, but by whom, where and by what authority.

With the foregoing in mind, this research contributed to the category of *analysis of policy*, more specifically to the analysis of the context of South African education policy documents in a globalised context. As the decoding of policy texts always depend upon the social context in which they are read, I have shown that it was significant to explore innovative perspectives on teacher autonomy and professionalism. However, this study also dealt with the *analysis for policy* as it showed the potential to provide policy-makers and educationists with information about the way in which teacher autonomy and professionalism are articulated in South African education policy in a globalised context.

As a consequence, I hold that this research probably go beyond what it means to be critical regarding the discourses under study. This research was more than just analysing the NSE, CPFTED and CPTD. Rather, I realised that I engaged in oppositional thinking, that is, I constantly critique meanings of teacher autonomy and professionalism so as to move beyond: “what we have not thought to think” (*vide*: Lather, 1991: 156). In doing so I have shown how theory (in terms of education policy) seem to be commensurate with practice as a kind of doing action. After all, practice is a form of doing action, because its ends exist in the action that emerged from the analysis of discourse (*vide*: Wahgid, 2002: 5).

In terms of my afore-going arguments and in an attempt to keep this research significant to South African education policy studies, it was not always easy to find my own voice.

6.5 MY OWN VOICE

Initially, I found it difficult to make myself heard in this dissertation. In this section, I shall share my experience regarding “own voice” with examples from this research.

Earlier I indicated how my promoter frequently insisted in “hearing my voice” while I tried to articulate the research methodology (Chapter 1) for this research. I did not understand this, but after extensive practice, I realised that the articulation of my own thoughts offered integrity to my arguments. For instance, because regularities were never applied before to analyse South African education policy to uncover innovative perspectives regarding teacher autonomy and professionalism, my thoughts in this regards were important. I then decided to *disturb the habit of making method definitive and* moved beyond the straight-jacketing confines of methodological rules. Thus, by starting to articulate my own thoughts, I found intellectual freedom, whilst I partly remained within and respecting the intensions of research methodology and research methods.

In Chapters 2 and 3, the struggle of adding my own voice continues. I frequently used phrases like: “it can be argued”; “the latter can be interpreted”; and “from the aforementioned it can be deduced that”. In terms of the use of the prior phrases, my promoter would frequently pose the question: “who is arguing, interpreting and deducing?” With the assistance of my critical reader, I started get more comfortable with the use of “I”; “my opinion” and “my argument”, amongst others. By using the first person, I started to find

myself in my own writing and became more passionate to communicate my arguments more strongly. I also became aware of the importance of reading and re-reading my work again and again and I was surprised how this helped me identify ways of communicating my thoughts.

While writing this section, I paused for a few moments and was amazed by how much I have improved in articulating my own thoughts. Having said this, I also thought of two articles I recently read (one of my promoter and one of Burbules). In those articles, both the researchers easily articulated their own thoughts (almost without any hesitation). I wish to become such a scholar in the near future – one who communicates his own thoughts without any uncertainty and one who becomes the authority of his own voice.

6.6 PUBLICATIONS

When I started Chapter 3 of this dissertation, I initially was very uncertain in terms of how I would explore regularities in South African education policies in a globalised context. Great was the surprise when, while planning and searching for information, a colleague and I were unexpectedly approached to write an article for the special addition of the *Communitas Journal* (2012). We wrote an article titled, *Power Relations: Exploring meanings in the Curriculum and Assessment Policy Statement (CAPS) (2011)*. A Foucauldian discourse analysis was conducted in which meanings conveyed in CAPS were explored and the manifestation of power relations in texts were interpreted (Palmer & de Klerk, 2012). This article was eventually published in the afore-mentioned journal in 2012. I also co-wrote an article, *Exploring the Perceptions of Pre-service Teachers' Experiences of Autonomy in Transformational Teaching* which was published in the *Journal of Social Sciences* (2012). Our argument was that, if pre-service teachers are empowered through sound institutional support to experience autonomous teaching practices, they might be able to improve their own teaching practices (De Klerk *et al.*, 2012: 274). These exercises opened the possibilities as to how I was going to conduct Chapter 3, because my main task during research was to analyse discourse and meanings in South African education policy texts.

I realised that writing articles whilst doing research for a PhD dissertation was a demanding process, but it was worthwhile. Not only did I jointly contribute to the body of knowledge, but I benefited from the process, because my ability to argue in terms of conducting research,

improved. Needless to say, the publication of the two articles created a sense of achievement and even better, our work has already been cited in an article written earlier in 2013 by another scholar.

For me, the publication of the above-mentioned articles contributed to the removal of a sense of isolation (*vide*: Van Wyk, 2004: 202) which I experienced during my lonesome journey whilst writing this dissertation.

6.7 A LONESOME JOURNEY

Mouton's (2001: 7) postulation that the writing of a dissertation can be considered a lonely undertaking is not far-fetched. Notwithstanding the support of my promoter, critical reader, a colleague and my son, this journey has been a very lonesome academic experience.

Doing research, using a research method never been applied before to analyse South African education policies, can be considered very strange by other academics. Not only was my ability to conduct research of this nature questioned by some academics, but I was also avoided by some who accused me of wanting to be "different than the usual PhD student".

Instead of feeling rejected and in an attempt to escape the confines of academic lonesomeness, I befriended Michel Foucault, one of the world's greatest philosophers of all times (according to me). I recited his thoughts to those who were willing to listen, advised other students to use his methods of genealogy and historiography, amongst others and audaciously share his views with my education students when I was still lecturer at a university in South Africa. I also convinced my best friend in the academy to use one of Foucault's methods while we were writing an article in 2012.

So, despite what seems to have been an overall lonesome journey, I am thankful for the support of those individuals who believed in me and encouraged me to never give up. This made my lonesome journey a little bearable.

Having reflected on the lonely times during this research, I shall next point out a few limitations of this study.

6.8 LIMITATIONS OF THE STUDY

Since no research is perfect, I want to reflect on some limitations of this study:

- In terms of research in South Africa, teacher autonomy and professionalism are to be considered contentious discourses and may therefore not be fully understood. This is proved in all the chapters in this study.
- Because of its conceptual foundation, this research did not capture the narratives of South African teachers regarding their views regarding teacher autonomy and professionalism from an educational policy perspective.
- Policy Archaeology examines the form of regularity, that is, the discursive conditions, which order the structure of a form of discourse and which determines how such orders come into being. However, whilst policy archaeology yields richer insights, it is limited by its inability to account for the historical emergence and transformation of discourses. Foucault addressed this limitation by shifting archaeology to genealogy, which traces the origin of discourses.

After reflecting on this study and articulating the limitations, I shall now provide a summary of this chapter.

6.9 CHAPTER SUMMARY

In this chapter I reflected on the purpose of this research as well as the contribution of this study to the body of knowledge. I also outlined my experience during this research, highlighted a few limitations of the study, whilst also indicating how I already contributed to the knowledge corpus through the publication of two articles.

Although I outlined six ways in which my research contributed to the body of knowledge, I want to add that my research is significant for education policy studies in South Africa and beyond its borders, because it proves that researchers do not have to follow particular research methods dogmatically, but that they can engage respectfully with other authors, whilst looking to and building on the insights of different academia. Thus, the application of policy archaeology, specifically arena 2, was in line with my research methodology.

Postmodern deconstruction enabled me to utilise new insights regarding teacher autonomy and professionalism so as to direct thought towards the awareness of other aspects relevant to the mentioned discourses without the intention of invalidating previous knowledge.

Without hesitation I can say that this study provides an answer to my research question: **How can a policy archaeology of South African education policy in a globalised context contribute to innovative perspectives on teacher autonomy and professionalism?** The regularities I labelled, the innovative perspectives regarding teacher autonomy and professionalism I explicated as well as my suggestions as to how South African teachers may be empowerment regarding professional autonomy, can indeed be regarded as groundbreaking and a fresh contribution to the body of knowledge.

6.10 INVITATION

Guided by postmodern deconstruction methodology, I avoided generalisations about teacher autonomy and professionalism in this study. I work with the assumption that knowledge is constantly changing and the search for alternative perspectives regarding the afore-mentioned discourses should be open to endless reinterpretations. Therefore, I shall not provide concluding remarks as is usually the case at the end of a dissertation or research project. Rather, I would like to invite academic scholars and educationists to employ ways of thinking regarding teacher autonomy and professionalism where universal truths about (education policy) texts, discourses and constructions of meaning are questioned. Considering my afore-going arguments, my invitation stems from my use of concepts like *regularities* as well as *teacher autonomy and professionalism*.

I am fully aware that policy archaeology and the application of its arenas are complex, although I think that Scheurich (1997) offered a fairly clear view of arenas I, II, III and IV. Nonetheless, I am convinced that I have initiated a different way of thinking about applying policy archaeology as research method in this study. I claimed to have been obedient to policy archaeology's call that regularities be considered an important part in applying research methods. However, I am convinced that the application of regularities requires more scrutiny and thought, because regularities cannot be pre-determined. For instance, Scheurich (1997) used five regularities (race, gender, class, governmentality and professionalization) to explore a problem, a problem group and policy solutions. On the other hand, I applied

regularities (governmentality, managerialism and performativity) to explore how teacher autonomy and professionalism are articulated in South African education policies in a globalised context. I speculate that there may be a lot more regularities to be labelled to explore meanings of discourses in education policy documents. My prior arguments are based on the notion that regularities change over time which implies that more meanings about education policy discourses wait to be explored and communicated. This gives reason why an ongoing exploration of regularities be regarded as vital for future research.

Already in Chapter 1, I highlighted that the academic literature has been silent regarding research conducted in terms of teacher autonomy and professionalism in the South African education policy landscape. Thus, no extensive research regarding the mentioned discourses has really been done in this country. For instance, I believe that it would be interesting to analyse South African teachers' narratives regarding teacher autonomy and professionalism as well as their perceptions of the mentioned discourses from an education policy point of view. I speculate that such views may even broaden the scope of innovative perspectives of teacher autonomy and professionalism. I am also tempted to say that it would be interesting to learn what knowledge a genealogy of teacher autonomy and professionalism would bring in terms of empowering South African teachers regarding the mentioned discourses.

I believe that, although I contributed to a different understanding of teacher autonomy and professionalism in this study, my preceding suggestions open the door for more research in future.

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